DOCUMENT RESUME

ED 478 633 CE 085 196

AUTHOR	Ray, Gayl M.; Wilson, Nick; Mangini, Rick
TITLE	Ohio Medical Office Management. Technical Competency Profile (TCP).
INSTITUTION	Ohio State Univ., Columbus. Center on Education and Training for Employment.; Ohio Board of Regents, Columbus.; Ohio State Dept. of Education, Columbus.
SPONS AGENCY	Ohio State Dept. of Education, Columbus. Div. of Career-Technical and Adult Education.
PUB DATE	2003-00-00
NOTE	117p.
CONTRACT	GRF-200-545
AVAILABLE FROM	For full text: http://www.ohtpcs.org/cp/medmgt.asp.
PUB TYPE	Guides - Non-Classroom (055)
EDRS PRICE	EDRS Price MF01/PC05 Plus Postage.
DESCRIPTORS	Academic Standards; Allied Health Occupations Education; Career Development; Competence; *Competency Based Education; Definitions; Employment Qualifications; Information Management; Job Skills; *Managerial Occupations; Money Management; *Office Management; Office Occupations Education; Postsecondary Education; Professional Development; Secondary Education; *State Curriculum Guides; State Standards; Statewide Planning; *Tech Prep
IDENTIFIERS	*Ohio

ABSTRACT

This document provides a framework for a broad-based secondary and postsecondary curriculum to prepare students for employment in medical office management. The first part of the technical competency profile (TCP) contains the following items: an explanation of the purpose and scope of Ohio's TCPs; college tech prep program standards; an overview of the scope and purpose of tech prep; a key to the profile codes; lists of the skills used in field of medical office management and sample occupations in the field; a business core and medical office management overview chart; lists of the core and medical office management instructional units; and lists of the business core competencies taught in each instructional unit. The remainder of the TCP details the competencies and key indicators addressed in the 14 instructional units of Ohio's medical office management program, which cover the following topics: professional development and networking; communication skills; front office management; financial functions of the front office; insurance claims management; medical office ethics; mid-level office management; human resources management; marketing; information systems management; risk management; organizational management; and clinical operations management. The following items are appended: a list of review panel members; the college tech prep pathway template; a list of professional associations and certificates; and a map of Ohio tech prep consortia. (MN)

Reproductions supplied by EDRS are the best that can be made
from the original document.

ED 478 633

Ohio
Medicall Office Management

Technicall Competency Profille (TCP)

U.S. DEPARTMENT OF EDUCATION
Office of Educational Research and Improvement
EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

This document has been reproduced as received from the person or organization originating it.

☐ Minor changes have been made to improve reproduction quality.

• Points of view or opinions stated in this document do not necessarily represent official OERI position or policy.

PERMISSION TO REPRODUCE AND DISSEMINATE THIS MATERIAL HAS BEEN GRANTED BY

M. Aring

TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)

1

2003

BEST COPY AVAILABLE

Ohio Medical Office Management

Technical Competency Profile (TCP)

Gayl M. Ray
Project Manager
College Tech Prep Curriculum Services
Center on Education and Training for Employment
The Ohio State University

Nick Wilson
Assistant Director
K-16 Tech Prep Initiatives
Ohio Board of Regents

Rick Mangini
Assistant Director
Business, Marketing, and Information Technology Education
Office of Career-Technical and Adult Education
Ohio Department of Education

2003

This project is supported in whole by the Ohio General Revenue Fund (GRF) 200-545, Vocational Education Enhancements, distributed by the Ohio Department of Education, Office of Career-Technical and Adult Education

This project is a collaborative effort of the Ohio Department of Education, Ohio Board of Regents, and The Ohio State University, Center on Education and Training for Employment

Table of Contents

Program Description

- Acknowledgements iii
- Introduction iv
- College Tech Prep Program Standards v
- College Tech Prep vi
- Key to Profile Codes vii

Program Description and Occupations List 1

Business Core and Medical Office Management Overview Chart 2

Instructional Units 13

Business Core Competencies 14

Medical Office Management Technical Competency Profile (TCP)

- Professional Development and Networking 52
- Communication Skills 54
- Front Office Management 56
- Financial Functions – Front Office 59
- Insurance Claims Management 61
- Medical Office Ethics 63
- Mid Level Office Management 65
- Financial Operations Management 66
- Human Resources Management 71
- Marketing 76
- Information Systems Management 79
- Risk Management 81
- Organizational Management 86
- Clinical Operations Management 90

Appendices

- Appendix A - Review Panels
  - Futuring Panel 1
  - Business Core Focus Panel 2
  - Business and Professional Panel 3
  - Educators Panel 4
  - Stakeholders Panel 5
- Appendix B - College Tech Prep Pathway Template 6
- Appendix C – Professional Associations and Certifications 9
- Appendix D - Ohio Tech Prep Consortia 10

Acknowledgements

The **Medical Office Management Technical Competency Profile (TCP)** project is a joint effort of the Ohio Board of Regents and the Ohio Department of Education. A number of individuals contributed their time and expertise to this initiative. In addition to the professionals listed in Appendix A, special thanks are due to:

- Vicki Melvin, Director, Career-Technical and Adult Education, Ohio Department of Education
- Jonathan L. Tafel, Vice Chancellor for Educational Linkages and Access, Ohio Board of Regents
- Linnae Clinton, Associate Director, Career-Technical and Adult Education, Ohio Department of Education
- Richard Arndt, Director, K-16 Initiatives, Ohio Board of Regents
- Kathy Sommers, College Tech Prep Coordinator, Career-Technical and Adult Education, Ohio Department of Education
- Nick Wilson, Assistant Director, K-16 Initiatives, Ohio Board of Regents
- Lavonna F. Miller, Former Project Director, College Tech Prep Curriculum Services, The Ohio State University
- Rick Mangini, Assistant Director; Business, Marketing, and Information Technology Education; Career-Technical and Adult Education, Ohio Department of Education;

Thanks are also due to the following:

Project Manager:	Gayl M. Ray, Research Specialist College Tech Prep Curriculum Services The Ohio State University
Project Liaison:	Ruth Ann Falconer-Tallman, Business Education Consultant Career-Technical and Adult Education Ohio Department of Education
Project Director:	Dee Allenspach, Educational Consultant Center on Education and Training for Employment The Ohio State University
Project Consultant:	Joyce Leimbach, Educational Consultant Center on Education and Training for Employment The Ohio State University
Information Services:	Damian Brown, Systems Specialist College Tech Prep Curriculum Services The Ohio State University
Administrative Support:	Janet I. Ray, Office Production Associate College Tech Prep Curriculum Services The Ohio State University

Introduction

Technical Competency Profiles (TCP) are collaboratively developed by the Ohio Board of Regents and the Ohio Department of Education, Career-Technical and Adult Education, and the Center on Education and Training for Employment at The Ohio State University. The profile provides a framework for a broad-based secondary and post-secondary curriculum.

The profile includes essential competencies for programs from secondary through post-secondary associate degree programs. Each area contains competencies common to each of the occupations within a career cluster and competencies specific to an occupation. This profile design reflects programming flexibility that represents many options for educational studies and career planning.

Representatives from a broad spectrum of Ohio professionals played a critical role in defining the vision and scope of the TCP and in defining the essential and recommended skills for current and future employees. Secondary and post-secondary educators representing Ohio schools and colleges leveled the competencies to create career pathways from secondary to associate degree programs. A list of business and industry representatives and educators participating in the development of the profile appears in Appendix A.

Technical Competency Profiles (TCP) are used as the basis for the development of an integrated delivery system that provides opportunities for new and challenging programs and courses. Career-Technical Education, College Tech Prep, and post-secondary degree programs will be enhanced and expanded through the use of the Technical Competency Profile (TCP).

The profiles are available on the Internet at www.ohtpcs.org. At this location users can download copies of the entire profile or conduct searches on a number of key variables.

For additional information contact:

College Tech Prep Curriculum Services
Center on Education & Training for Employment
The Ohio State University
1900 Kenny Road
Columbus, OH 43210
614/688-8501

Business, Marketing, & Information Technology Education
Ohio Department of Education
25 South Front Street, Sixth Floor
Columbus, OH 43215
614/466-3891

College Tech Prep Program Standards

College Tech Prep programs are rigorous programs of study starting at the secondary school level and continuing through the associate degree and beyond. In accordance with the Carl D. Perkins Vocational Technical Education Enhancement Act of 1998, College Tech Prep programs are seamless, non-duplicative programs of study combining high-level academic and technical preparation in a variety of career fields.

The Carl D. Perkins Vocational and Technical Education Act of 1998 defines College Tech Prep as:

> *A program that provides technical preparation in a career field such as engineering, applied science, a mechanical, industrial or practical arts or trade, agriculture, health occupations, business or applied economics and must do the following:*
> - *Combines at least two years of secondary and two years of post-secondary education in a sequential course of study without duplication of coursework*
> - *Integrates academic, vocational and technical education, and if appropriate and available, work-based learning*
> - *Provides technical preparation for careers*
> - *Leads to an associate or a baccalaureate degree or post-secondary certificate in a specific career field*
> - *Leads to placement in appropriate employment or further education.*

The Ohio College Tech Prep Advisory Council recommended to the Ohio Board of Regents and the Ohio Department of Education the following standards for all College Tech Prep programs:

1. Academics are taught at a college-preparatory level and are aligned with state models and academic content standards.
2. In addition to Ohio graduation requirements specified in SB 55, required academic components for College Tech Prep programs include:
    a. Mathematics taught at a minimum level of Algebra II by the completion of high school.
    b. An integrated or stand alone senior-year math component
    c. Three units of science including at least two lab-based science courses
3. College Tech Prep programs will use a state-developed Technical Competency Profile (TCP) as the basis for pathway development. The pathway document should reflect secondary and post-secondary course work and should be made available for stakeholders. All secondary and post-secondary TCP competencies must be clearly identified and addressed. The TCP is the framework used to develop all associated curricular documents; however, components from other competency profiles such as OCAP's (*Occupational Competency Analysis Profile*), ITAC's (*Integrated Technical and Academic Competencies)* and SCANS (*The Secretary's Commission on Achieving Necessary Skills—America 2000*) may be included and are not mutually excluded from a TCP.
4. Articulated pathways will be reviewed every two-years at the consortia level.
5. Pathways operate under an articulation agreement between/among partners in a consortium.
6. College Tech Prep programs at the secondary level will operate as state-approved, career-technical education programs.
7. Academic and technical instruction is integrated and delivered in a contextual approach where possible.
8. Programs have common representation from secondary education, higher education, business, and labor members.
9. Post-secondary programs contain advanced skills in the TCP document.
10. Programs must operate under either regionally accredited post-secondary institutions/degrees or approved apprenticeship programs meeting U.S. Department of Labor standards.
11. College Tech Prep programs, secondary and post-secondary, must comply with the state College Tech Prep Advisory Council's performance measures.

State College Tech Prep Advisory Council
Revised and Approved: May 1, 2002

College Tech Prep

College Tech Prep is a high school and college career path linked to business, industry, and labor that insures a specified seamless pathway from high school to college to careers, meeting Ohio's technological employment needs.

A College Tech Prep student is enrolled in a state-approved College Tech Prep education program. A College Tech Prep Program means a program of study that:

- Combines, at a minimum, two years of secondary education (as determined by Ohio definitions) with a minimum of two years of post-secondary education in a non-duplicative, sequential course of study.
- Integrates academic and technical instruction and utilizes work-based and work-site learning, where appropriate and available.
- Provides technical preparation in a career field such as engineering technology; applied science; mechanical; industrial or practical arts or trades; agriculture; health occupations; business; or applied economics.
- Builds student competencies in mathematics, science, reading, writing, communications, economics, and workplace skills through applied, contextual academics, and integrated instruction, in a coherent sequence of courses.
- Leads to an associate or baccalaureate degree, or a BAT (Bureau of Apprenticeship Training) apprenticeship requiring a minimum of two years in a specific career field.
- Leads to placement in related employment, or to further education.

Key to Profile Codes

Importance of Competencies

All of the competencies in this document represent the minimum requirements for a College Tech Prep program. It is the responsibility of the local consortia to further define and/or expand, as needed, the key indicators for each competency. Each competency must be taught at the Proficient level (P) by the completion of the College Tech Prep program, which is an Associate Degree (AD). A minimal number of competencies have been identified as Introduce (I) at the Associate Degree level. These may require further higher education.

This document integrates college prep level academics with technical skill. Technical skills are a required component.

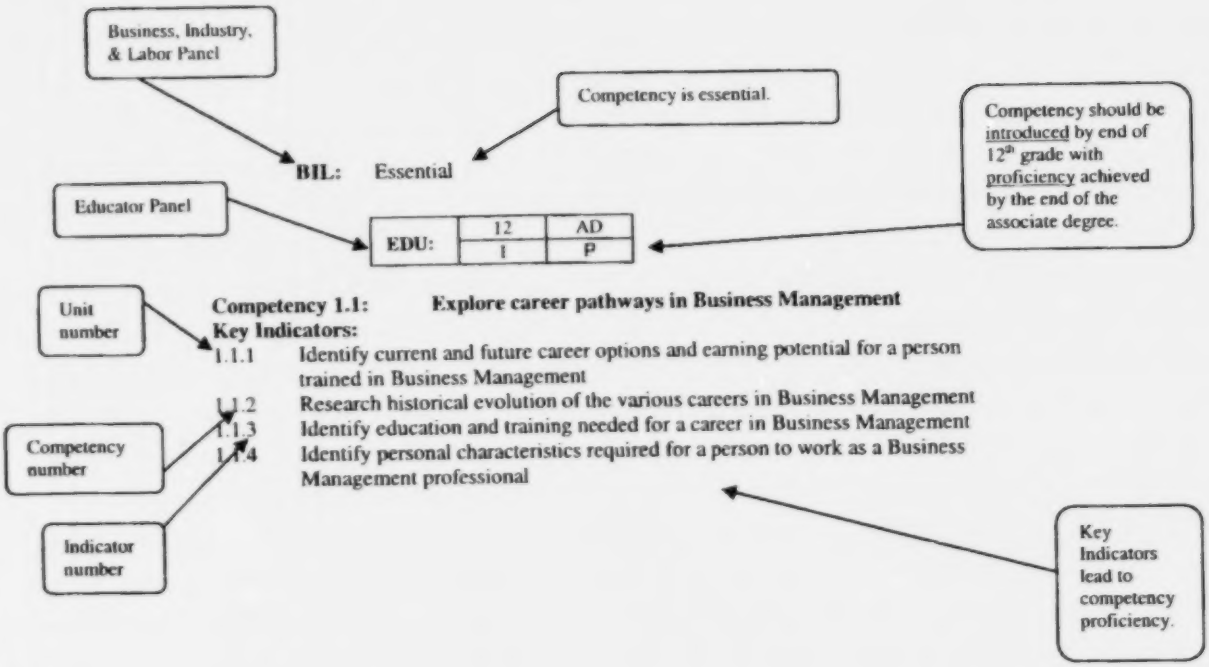
- **I =** **Introduce** (Learner will demonstrate knowledge and comprehension of the competency.)
- **P =** **Proficient** (Learner will demonstrate ability to apply knowledge of and/or perform the competency.)
- **R =** **Reinforced** (Competencies marked proficient at the secondary level are to be reinforced at the associate degree level.)

Grade Level: **12** = by the end of grade 12
AD = by the end of the Associate Degree

ACADEMIC CONNECTION

All College Tech Prep programs are responsible for meeting the academic content standards.

EXAMPLE:


Business, Industry, & Labor Panel
Competency is essential.
Competency should be introduced by end of 12th grade with proficiency achieved by the end of the associate degree.
BIL: Essential
Educator Panel
EDU: 12 AD
I P
Unit number
Competency 1.1: Explore career pathways in Business Management
Key Indicators:
1.1.1 Identify current and future career options and earning potential for a person trained in Business Management
1.1.2 Research historical evolution of the various careers in Business Management
1.1.3 Identify education and training needed for a career in Business Management
1.1.4 Identify personal characteristics required for a person to work as a Business Management professional
Competency number
Indicator number
Key Indicators lead to competency proficiency.

Medical Office Management

Students who study a Medical Management program will be prepared for employment in a variety of medical office and healthcare management settings. The curriculum includes skills that are critical to success in a medical office, i.e., professionalism, communication skills, front office management, insurance claims management, medical office ethics; other management sectors included are: financial operations, human resources, marketing, information systems, risk management, organizational, and clinical operations management. Employment in the health-care services field is expected to grow faster than the average for most occupations.

Sample Occupations

Admissions Specialist
Benefits Coordinator
Clinical Data Specialist
Patient Information Coordinator
Medical Records and Health Information Technician
Medical Accounts Specialist
Medical Billing Specialist
Medical Compliance Officer
Medical Records Technician
Medical and Health Services Manager
Medical Unit Coordinator
Claims Processor
Medical Code Specialist (Insurance)

2003 MEDICAL OFFICE MANAGEMENT COMPETENCY CHART

NOTE: Instruction in the Medical Office Management competency profile should be preceded by instruction in the Business Core Competencies. Each competency is coded: I = Introductory; P = Proficient; R = Reinforce.

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
1	**Career Development in Business**			
	1.1 Demonstrate knowledge of the history of business operations	P		
	1.2 Identify desirable personality traits important to businesses	P		
	1.3 Assess personal interests and skills needed for success in business	P		
	1.4 Set personal goals	P		
	1.5 Explain the need for employee development	P		
	1.6 Explain potential career advancement patterns for jobs	P		
	1.7 Describe skills and factors that enhance career progression	P		
	1.8 Use networking techniques for professional growth	P		
	1.9 Use resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, mentors)	P		
	1.10 Manage professional development	P		
2	**Professional Effectiveness**			
	2.1 Explain professional responsibilities	P		
	2.2 Describe work ethic standards	P		
	2.3 Identify legal and ethical behavior	P		
	2.4 Apply appropriate work ethic	P		
	2.5 Demonstrate ethical work habits	P		
	2.6 Recognize personal biases and stereotypes	P		
	2.7 Apply time-management principles	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	2.8 Explain the rights of workers	P		
	2.9 Function as a self-managed employee	P		
	2.10 Follow intellectual property rights and copyright laws	P		
	2.11 Apply decision-making techniques	P		
	2.12 Apply problem-solving techniques	P		
	2.13 Explain the nature of stress management	P		
	2.14 Manage stressful situations	P		
	2.15 Achieve organizational goals	P		
	2.16 Maintain a safe working environment	P		
	2.17 Maintain company security	P		
	2.18 Participate in the organization's community outreach involvement	P		
3	**Business Economics**			
	3.1 Compare basic types of economic systems	P		
	3.2 Compare basic features of different economic systems	P		
	3.3 Distinguish between economic goods and services	P		
	3.4 Explain importance of resources to the economy	P		
	3.5 Describe the nature of economics and economic activities	P		
	3.6 Explain the principles of supply and demand	P		
	3.7 Describe the concept of price	P		
	3.8 Examine characteristics of business	P		
	3.9 Demonstrate knowledge of business operation	P		
	3.10 Explain concept of organized labor and business	P		
	3.11 Apply business economic concepts	P		
	3.12 Examine issues related to managing economic resources	P		
	3.13 Analyze economic indicators and trends	P		
	3.14 Explain measures used to analyze economic conditions	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	3.15 Explain the role of the Consumer Price Index (CPI) in business	P		
	3.16 Explain the concept of Gross Domestic Product (GDP)	P		
	3.17 Describe the nature of current economic problems	P		
	3.18 Explain the nature of international trade	P		
	3.19 Identify the impact of cultural and social environments on world trade	P		
	3.20 Evaluate influences on a nation's ability to trade	P		
4	**Business Communications**			
	4.1 Explain nature of effective communication	P		
	4.2 Apply effective listening skills	P		
	4.3 Use proper grammar and vocabulary	P		
	4.4 Explain the nature of effective verbal communication	P		
	4.5 Address people properly	P		
	4.6 Handle telephone calls in a businesslike manner	P		
	4.7 Make oral presentations	P		
	4.8 Utilize written communication	P		
	4.9 Use communication technologies/systems (e.g., e-mail, facsimile transaction [FAX], voice mail, cell phones, conference calling, answering systems, teleconferencing)	P		
	4.10 Communicate using telecommunications tools	P		
	4.11 Communicate effectively following company guidelines in the business environment	P		
	4.12 Demonstrate ethical behavior in workplace communication	P		
	4.13 Foster positive working relationships	P		
	4.14 Demonstrate teamwork	P		
	4.15 Explain nature of positive customer/client relations	P		
	4.16 Explain the nature of organizational change	P		
	4.17 Describe the nature of organizational conflict	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	4.18 Build customer and coworker relations	P		
	4.19 Build customer service	P		
	4.20 Deliver business presentations	P		
	4.21 Prepare written business documents	P		
5	**Accounting**			
	5.1 Complete the accounting cycle	P		
	5.2 Apply generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity	P		
	5.3 Maintain cash control	P		
6	**Computation**			
	6.1 Apply mathematics skills in business operations	P		
	6.2 Determine mathematical procedures to solve business problems	P		
	6.3 Use mathematical procedures to calculate wages and benefits	P		
	6.4 Interpret data using common statistical procedures	P		
	6.5 Use mathematical procedures to solve business problems	P		
7	**Business Law**			
	7.1 Examine foundation of business law	P		
	7.2 Explore the American legal system	P		
	7.3 Describe the difference between ethics and the law	P		
	7.4 Discuss the relationships between contract law, law of sales, and consumer law	P		
	7.5 Describe legal aspects of business formation	P		
	7.6 Describe functions of commercial paper, insurance, secured transactions, and business bankruptcy	P		
8	**Technology**			
	8.1 Utilize computer hardware	P		
	8.2 Discuss various types of computer software	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	8.3 Use computer operating systems	P		
	8.4 Use applications	P		
	8.5 Utilize on-line functions	P		
	8.6 Utilize electronic mail	P		
	8.7 Utilize the Internet	P		
	8.8 Assess impact of technology on the workplace	P		
	8.9 Use references and data from technological sources (e.g., gather, evaluate, use, cite)	P		
	8.10 Adhere to laws governing technology	P		
	8.11 Develop skills and knowledge needed to obtain technical support services	P		
	8.12 Abide by risk-management policies and procedures for technology	P		
	8.13 Follow policies for managing privacy and ethical issues in organizations	P		
	8.14 Apply technology to business applications	P		
	8.15 Use Internet as a business tool	P		
9	**International Business**			
	9.1 Explain impact of international business	P		
	9.2 Apply communication strategies necessary for effective and profitable international business relations	P		
10	**Management**			
	10.1 Identify business management practices	P		
	10.2 Discuss management functions and their integration within the business functions	P		
	10.3 Explain management theories and their application with the business environment	P		
	10.4 Describe human resource functions and their importance to an organization's successful operation	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
11	**Marketing**			
	11.1 Explain impact of marketing activities on the individual, business, and society	P		
	11.2 Describe characteristics, motivations, and behaviors of consumers	P		
	11.3 Describe influence of external factors on marketing	P		
	11.4 Discuss elements of the marketing mix and how they are used in the marketing process	P		
	11.5 Describe elements, design, and purposes of the marketing plan	P		
	11.6 Evaluate marketing concepts	P		
	11.7 Examine the role of the selling process	P		
12	**Entrepreneurship**			
	12.1 Identify factors to be considered by a potential entrepreneur	P		
	12.2 Apply economic concepts when making decisions for an entrepreneurial venture	P		
	12.3 Discuss how forms of business ownership, government regulations, and business ethics affect entrepreneurial ventures	P		
	12.4 Analyze financial data	P		
	12.5 Analyze credit issues	P		
	12.6 Develop a financial plan	P		
	12.7 Perform banking functions	P		
	12.8 Apply analytical skills in business operations	P		
	12.9 Identify key elements of business organizations	P		
	12.10 Identify business management practices	P		
	12.11 Perform scheduling functions	P		
	12.12 Conduct meetings and other group functions	P		
	12.13 Maintain a records management system	P		
	12.14 Manage inventory	P		

INSTRUCTIONAL UNIT	CORE COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	12.15 Examine personnel management concepts	P		
	12.16 Perform shipping and mailing functions	P		

INSTRUCTIONAL UNIT	MEDICAL OFFICE MANAGEMENT COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
1	**Professional Development and Networking**			
	1.1 Explore career pathways in medical office management		P	R
	1.2 Participate in professional development opportunities for an employee in medical office management position		P	R
	1.3 Engage in professional networking		P	R
	1.4 Read medical management professional materials		P	R
2	**Communication Skills**			
	2.1 Apply communication skills		P	R
	2.2 Prepare documents		P	R
3	**Front Office Management**			
	3.1 Function as a self-managed employee		P	R
	3.2 Perform telephone triage		P	R
	3.3 Maintain patient records		P	R
	3.4 Manage office computer system		P	R
	3.5 Perform reception duties		P	R
	3.6 Manage appointment system		P	R
4	**Financial Functions**			
	4.1 Perform payroll procedures		P	R
	4.2 Perform financial duties for the medical office setting		P	R
5	**Insurance Claims Management**			
	5.1 Discuss healthcare insurance concepts		P	R
	5.2 Process insurance forms		P	R
	5.3 Manage insurance records filing system		I	P

INSTRUCTIONAL UNIT	MEDICAL OFFICE MANAGEMENT COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
6	**Medical Office Ethics**			
	6.1 Comply with professional protocol with regard to legal issues		P	R
	6.2 Comply with professional protocol with regard to patient issues		P	R
	6.3 Follow medical ethics when communicating patient data		P	R
	6.4 Adhere to established professional work ethics		P	R
7	**Mid-Level Office Management**			
	7.1 Manage general office medical practices		I	P
	7.2 Maintain administrative and clinical office supplies in accordance with office protocol		I	P
8	**Financial Operations Management**			
	8.1 Manage office budgets		I	P
	8.2 Maintain accounting and financial control systems			P
	8.3 Analyze financial statements			P
	8.4 Develop system for materials procurement and payments			P
	8.5 Monitor coding for reimbursement procedures			P
	8.6 Explore investment plans			P
	8.7 Interact with bankers and financial consultants			P
	8.8 Analyze fee schedules			P
	8.9 Negotiate third-party contracts		I	P
	8.10 Develop system for third-party payor reimbursement		I	P
	8.11 Monitor compliance for tax laws, filing procedures, and deadlines			
	8.12 Maintain quality and assurances in the office setting			P
9	**Human Resource (HR) Management**			
	9.1 Design employee compensation and benefits program			P
	9.2 Develop a system for job classifications within the organization		I	P

INSTRUCTIONAL UNIT	MEDICAL OFFICE MANAGEMENT COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	9.3 Identify employee placement and workforce needs		I	P
	9.4 Develop procedures for employee evaluation and appraisal		I	P
	9.5 Design an employee training and continuing education program		I	P
	9.6 Develop program for conflict resolution and office employee relations		I	P
	9.7 Maintain current conflict resolution and grievance procedures in office policy manual		I	P
	9.8 Monitor compliance with state and federal employment laws		I	P
	9.9 Facilitate retirement planning		I	P
10	**Marketing**			
	10.1 Develop an overall business plan for the medical practice		P	R
	10.2 Develop strategic plan for marketing (e.g., one-, three-, and five-year)		I	P
	10.3 Design marketing plan		P	R
	10.4 Assess effectiveness of strategic, business, and marketing plans		P	
	10.5 Network to develop professional partnerships		I	P
	10.6 Initiate a public relations plan that includes community outreach programs		P	R
11	**Information Systems Management**			
	11.1 Conduct analysis of information systems needed for the medical practice			P
	11.2 Conduct information system training			P
	11.3 Manage database for information system			P
	11.4 Manage network security for information system			P
	11.5 Access electronic information resources			P

INSTRUCTIONAL UNIT	MEDICAL OFFICE MANAGEMENT COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
12	**Risk Management**			
	12.1 Maintain safety in the medical setting		P	R
	12.2 Complete first aid and cardiopulmonary resuscitation (CPR) training		P	R
	12.3 Respond to medical office emergencies		P	R
	12.4 Protect workers from ergonomic injuries in office setting		P	R
	12.5 Maintain legal compliance for risk management within the medical practice		I	P
	12.6 Utilize record-keeping procedures that include procedure for archiving medical practice history data		P	
	12.7 Maintain liability insurances (e.g., property, personal, malpractice, embezzlement)		I	P
	12.8 Establish personnel and property security plans and policies		I	P
	12.9 Develop quality assurance and patient satisfaction program via follow-up survey process		I	P
	12.10 Develop/document information security procedures (e.g., patient, personnel, business information)		I	P
	12.11 Audit at-risk financial activities on regular schedule		I	P
	12.12 Network with professional resources for at-risk related issues			P
	12.13 Monitor compliance with contractual mandates			P
13	**Organizational Management**			
	13.1 Develop/maintain medical office policy manual			P
	13.2 Provide leadership for organizational change of the medical practice			P
	13.3 Develop/maintain governing system			P
	13.4 Assess governing systems			P
	13.5 Conduct stakeholder assessment			P
	13.6 Manage staff teaming		I	P

INSTRUCTIONAL UNIT	MEDICAL OFFICE MANAGEMENT COMPETENCY	BUSINESS CORE All P at level 12	PROFICIENT HS	PROFICIENT AD
	13.7 Facilitate physician/doctor's understanding of good business medical practice		I	P
	13.8 Implement quality assurance program		I	P
14	**Clinical Operations**			
	14.1 Facilitate business operations		I	P
	14.2 Analyze staffing needs and scheduling		I	P
	14.3 Analyze need for ancillary clinical support services (e.g., lab, x-ray, rehabilitation)		I	P
	14.4 Establish purchasing system and inventory control			P
	14.5 Establish patient flow schedule		I	P
	14.6 Implement patient communication system		I	P
	14.7 Design clinical pathway system			P
	14.8 Facilitate system for monitoring credentials, licenses, and certifications		I	P
	14.9 Design process for improving overall clinic operations			P

Medical Office Management TCP

Core Instructional Units

1. Career Development for Business
2. Professional Effectiveness
3. Business Economics
4. Business Communications
5. Accounting
6. Computation
7. Business Law
8. Technology
9. International Business
10. Management
11. Marketing
12. Entrepreneurship

Medical Office Management Instructional Units

1. Professional Development and Networking
2. Communication Skills
3. Front Office Management
4. Financial Functions – Front Office
5. Insurance Claims Management
6. Medical Office Ethics
7. Mid-Level Office Management
8. Financial Operations Management
9. Human Resources Management
10. Marketing
11. Information Systems Management
12. Risk Management
13. Organizational Management
14. Clinical Operations Management

Core for Business TCP

Instructional Unit 1: Career Development in Business

Competency 1.1: Demonstrate knowledge of the history of business operations
Key Indicators:

1.1.1 Describe history of business
1.1.2 Compare/contrast current business practices with those of the twentieth century
1.1.3 Explore careers within the field of business and management

Competency 1.2: Identify desirable personality traits important to businesses
Key Indicators:

1.2.1 Describe personality trait terms (e.g., trait, physical traits, mental traits, emotional traits, dependability, industriousness, honesty and integrity, loyalty, positive attitude, interest and enthusiasm, adaptability, initiative, creativity, self-control, self-confidence, empathy, assertiveness, leadership, cooperativeness, orderliness)
1.2.2 Identify categories of personal traits
1.2.3 Describe interdependence of personal traits
1.2.4 Describe types of desirable personal traits in business
1.2.5 Describe steps that can be taken to change undesirable personal traits
1.2.6 Maintain appropriate personal appearance
1.2.7 Maintain positive attitude
1.2.8 Show empathy for others
1.2.9 Demonstrate interest and enthusiasm, responsible behavior, honesty and integrity, initiative, and self-control

Competency 1.3: Assess personal interests and skills needed for success in business
Key Indicators:

1.3.1 Describe personal characteristics (e.g., realistic, investigative, artistic, social, enterprising, creative)
1.3.2 Assess strengths and weaknesses
1.3.3 Explain reasons for assessing personal interests and skills
1.3.4 Discuss the importance of objectivity in personal assessment

Competency 1.4: Set personal goals
Key Indicators:

1.4.1 Describe goal-setting terms (e.g., goals and short- and long-term goals)
1.4.2 Describe benefits of setting goals
1.4.3 Demonstrate steps for setting goals

Competency 1.5: Explain the need for employee development
Key Indicators:
1.5.1 Explain benefits associated with the continuing education for employees
1.5.2 Identify types of training provided by companies for their employees
1.5.3 Identify external sources of employee training
1.5.4 Explain types of external training available to employees
1.5.5 Describe occasions when employees need training

Competency 1.6: Explain potential career advancement patterns for jobs
Key Indicators:
1.6.1 Describe occupational terms (e.g., job, career, occupation, job promotion, seniority)
1.6.2 Explain value of entry-level job positions
1.6.3 Identify reasons promotion opportunities arise
1.6.4 Explain why change may be necessary for workers to advance
1.6.5 Compare/contrast promotion opportunities among occupations and various business career pathways

Competency 1.7: Describe skills and factors that enhance career progression
Key Indicators:
1.7.1 Describe factors employers consider when making promotion decisions (e.g., skills, personal characteristics, education, seniority, job performance)
1.7.2 Explain techniques employees can use to enhance career progression
1.7.3 Explain ways of maintaining positive working relationships with other workers

Competency 1.8: Use networking techniques for professional growth
Key Indicators:
1.8.1 Describe benefits of networking
1.8.2 Discuss occasions and techniques for networking
1.8.3 Demonstrate procedures for using networking techniques for professional growth

Competency 1.9: Use resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows, mentors)
Key Indicators:
1.9.1 Describe benefits obtained from reading professional trade journals/periodicals
1.9.2 Describe benefits of membership in a professional organization
1.9.3 Explain ways that classes/seminars can contribute to professional development
1.9.4 Identify types and benefits of various trade shows

Competency 1.10: Manage professional development
Key Indicators:

1.10.1 Practice lifelong learning
1.10.2 Participate in professional organizations/associations
1.10.3 Read professional publications
1.10.4 Build internal/external mentor relationships
1.10.5 Build internal/external professional system
1.10.6 Build professional network
1.10.7 Strengthen management, communication, and leadership skills
1.10.8 Determine the benefits to business of employees' belonging to professional organizations (e.g., membership, networking)

Instructional Unit 2: Professional Effectiveness

Competency 2.1: Explain professional responsibilities
Key Indicators:
2.1.1 Explain need for professional and ethical standards
2.1.2 Explain responsibility of the individual to apply ethical standards
2.1.3 Identify responsibility to clients and employers
2.1.4 Explain consequences of unprofessional and/or unethical behavior
2.1.5 Explain importance of conflict resolution in the work environment

Competency 2.2: Describe work ethic standards
Key Indicators:
2.2.1 Define work ethic
2.2.2 Identify factors that influence one's work ethic
2.2.3 Differentiate between law and ethics
2.2.4 Describe how personal values are reflected in work ethic
2.2.5 Describe how interactions in the workplace affect personal work ethic
2.2.6 Describe how life changes affect personal work ethic

Competency 2.3: Identify legal and ethical behavior
Key Indicators:
2.3.1 Differentiate between legal and ethical behavior
2.3.2 Explain terms, principles, and characteristics of legal and ethical behavior (e.g., loyalty, discretion, competitor, supplier)
2.3.3 Explain legal ramifications of breaching rules and regulations
2.3.4 Explain effects of unethical and/or unlawful behavior

Competency 2.4: Apply appropriate work ethic
Key Indicators:
2.4.1 Adhere to company and/or governmental policies, procedures, rules, and regulations
2.4.2 Exercise confidentiality
2.4.3 Adhere to rules of conduct
2.4.4 Accept constructive criticism
2.4.5 Offer constructive criticism
2.4.6 Exhibit pride in work
2.4.7 Resolve conflict
2.4.8 Mentor fellow workers
2.4.9 Avoid sexual connotations and harassment
2.4.10 Adjust to changes in the work environment
2.4.11 Exhibit punctuality
2.4.12 Assume responsibility for decisions and actions
2.4.13 Take responsibility for assignments
2.4.14 Follow chain-of-command

Competency 2.5: Demonstrate ethical work habits
Key Indicators:
2.5.1 Describe ethic terms (e.g., ethics, personal code of ethics)
2.5.2 Identify examples of unethical behavior at work
2.5.3 Describe ways to demonstrate a basic work ethic

Competency 2.6: Recognize personal biases and stereotypes
Key Indicators:
2.6.1 Describe personality terms (e.g., discrimination, prejudice, bias, stereotype)
2.6.2 Recognize factors that are important to consider when evaluating others in the workplace
2.6.3 Identify situations in which discrimination exists
2.6.4 Describe consequences of discrimination
2.6.5 Explain how federal laws protect against discrimination
2.6.6 Describe steps for identifying personal biases and stereotypes
2.6.7 Explain why diversity is an asset to an organization

Competency 2.7: Apply time-management principles
Key Indicators:
2.7.1 Describe time-management terms (e.g., time management, stress, procrastination, free time, weekly master list, technology, prioritize, delegate, to-do list)
2.7.2 Explain time-management process
2.7.3 List benefits of time management
2.7.4 Utilize current technology as a tool for time management

Competency 2.8: Explain the rights of workers
Key Indicators:
2.8.1 Describe employee's right to safe working environment (e.g., safe ergonomic practices, clean air)
2.8.2 Discuss employee's right to form unions
2.8.3 Explain employee's right to equitable treatment

Competency 2.9: Function as a self-managed employee
Key Indicators:
2.9.1 Propose projects
2.9.2 Organize tasks
2.9.3 Manage time
2.9.4 Meet deadlines
2.9.5 Maintain business records
2.9.6 Make long-term and short-term plans
2.9.7 Evaluate progress
2.9.8 Report progress

2.9.9 Delegate projects
2.9.10 Acquire appropriate licenses/registrations/credentials

Competency 2.10: Follow intellectual property rights and copyright laws
Key Indicators:
2.10.1 Explain purpose of patent
2.10.2 Explain purpose of copyright
2.10.3 Explain purpose of licenses
2.10.4 Explain purposes of trademarks
2.10.5 Explain rights of the originator
2.10.6 Explain rights of the public
2.10.7 Define confidentiality
2.10.8 Define proprietary
2.10.9 Explain legal ownership of proprietary material
2.10.10 Describe stock image/text usage rights
2.10.11 Explain negotiation of contracts
2.10.12 Explain reproduction licensing and residual usage
2.10.13 Apply concepts of intellectual property rights and copyright laws

Competency 2.11: Apply decision-making techniques
Key Indicators:
2.11.1 Identify decision to be made
2.11.1 Identify appropriate alternatives and consequences
2.11.2 Make decisions based on facts, legality, ethics, goals, and culture
2.11.3 Apply time factors
2.11.4 Present decision to be implemented
2.11.5 Evaluate decision
2.11.6 Accept responsibility for decision
2.11.7 Identify ownership of decision made

Competency 2.12: Apply problem-solving techniques
Key Indicators:
2.12.1 Identify problem
2.12.2 Select appropriate problem solving tools/techniques
2.12.3 Identify underlying causes of problem
2.12.4 Identify appropriate solutions and consequences (e.g., long-term, short-term, crisis)
2.12.5 Use resources to explore possible solutions to problem
2.12.6 Contrast advantages and disadvantages of each solution
2.12.7 Identify appropriate action
2.12.8 Evaluate results
2.12.9 Identify post-preventive action

Competency 2.13: Explain the nature of stress management
Key Indicators:
2.13.1 Describe signs of employee stress
2.13.2 Discuss causes of employee stress
2.13.3 Explain consequences of stress
2.13.4 Explain wellness programs that can identify, alleviate, and prevent employee stress

Competency 2.14: Manage stressful situations
Key Indicators:
2.14.1 Accept stress as integral part of life
2.14.2 Identify factors contributing to stress
2.14.3 Describe physical and emotional responses to stress
2.14.4 Evaluate positive and negative effects of stress on productivity
2.14.5 Identify strategies and/or methods to reduce/channel stress
2.14.6 Implement strategies to manage stress
2.14.7 Create strategies for developing and maintaining support systems

Competency 2.15: Achieve organizational goals
Key Indicators:
2.15.1 Evaluate personal goals in relation to organizational goals
2.15.2 Monitor progress by evaluating feedback
2.15.3 List responsibilities in relation to organizational goals
2.15.4 Accomplish assigned tasks
2.15.5 Exercise responsibility in relation to organizational goals
2.15.6 Set appropriate performance standards
2.15.7 Communicate goals with supervisor/peers
2.15.8 Exhibit knowledge of organization's products and services
2.15.9 Promote organizational image and mission

Competency 2.16: Maintain a safe working environment
Key Indicators:
2.16.1 Discuss the relationship between safety, productivity, and health
2.16.2 Identify health and safety standards established by government agencies
2.16.3 Ensure compliance with government and/or company rules and regulations related to health and safety
2.16.4 Access needed safety information using company and manufacturer's references
2.16.5 Establish preventive measures for dealing with the main causes of accidents in the work environment
2.16.6 Establish preventive measures for dealing with the main causes of health problems in the work environment
2.16.7 Establish preventive measures for dealing with violations of personnel security
2.16.8 Ensure maintenance of a clean work area

2.16.9 Perform safety inspections and audits
2.16.10 Solve safety problems using problem-solving, decision-making, and critical-thinking strategies

Competency 2.17: Maintain company security
Key Indicators:
2.17.1 Access needed information using company references
2.17.2 Plan security procedures in accordance with business ethics
2.17.3 Document security procedures
2.17.4 Communicate security procedures internally
2.17.5 Ensure compliance with security procedures
2.17.6 Perform security checks
2.17.7 Correct security problems

Competency 2.18: Participate in the organization's community outreach involvement
Key Indicators:
2.18.1 Propose educational, environmental, and community needs and social issues for which to focus organizational involvement
2.18.2 Select issues on which to focus organizational support
2.18.3 Participate in social and/or outreach activities
2.18.4 Encourage staff involvement
2.18.5 Recognize the importance of the organization's social and community relationships and their effects on the organization

Instructional Unit 3: Business Economics

Competency 3.1: Compare basic types of economic systems
Key Indicators:

3.1.1 Describe economic terms (e.g., economic system, traditional economic system command economic system, communism, socialism, market economic system)
3.1.2 Explain why economic systems are needed
3.1.3 Describe characteristics of economic systems
3.1.4 Describe characteristics of a market economic system
3.1.5 Describe strengths and weaknesses of various economies
3.1.6 Describe strengths and weaknesses of market economies

Competency 3.2: Compare basic features of different economic systems
Key Indicators:

3.2.1 Explore existing economies by comparing command, mixed, and market economies based on the criteria of freedom, efficiency, equity, security, employment, stability, and growth
3.2.2 Explain how change in one component of the circular flow of economic activity affects other components
3.2.3 Explain how economic systems, resources, and culture affect each other
3.2.4 Discuss how wages and prices are determined in command and market economies
3.2.5 Compare command, mixed, and market economies based on the criteria of freedom, efficiency, equity, security, employment, stability, and growth

Competency 3.3: Distinguish between economic goods and services
Key Indicators:

3.3.1 Describe economic terms (e.g., want, economic want, non-economic want, goods, services, consumer goods, industrial goods)
3.3.2 Distinguish between economic and non-economic wants
3.3.3 Distinguish between consumer and industrial goods and services
3.3.4 Explain how consumers affect the decision of what goods and services will be produced

Competency 3.4: Explain importance of resources to the economy
Key Indicators:

3.4.1 Describe economic resource terms (e.g., economic resources, natural resources, capital goods, human resources, factors of production)
3.4.2 List reasons that economic resources are important for business
3.4.3 Explain why natural resources, capital resources, and human resources are limited
3.4.4 Describe ways that businesses respond to limited resources

Competency 3.5: Describe the nature of economics and economic activities
Key Indicators:
3.5.1 Describe economic terms (e.g., economics, scarcity, economizing, opportunity cost, trade-offs, consumption, consumer, production, producer, exchange, distribution)
3.5.2 Discuss why scarcity exists
3.5.3 Describe economic questions that all societies must answer, (e.g., what to produce, how to produce, when to produce)
3.5.4 Explain importance of decision-making in economics
3.5.5 Describe economic activities

Competency 3.6: Explain the principles of supply and demand
Key Indicators:
3.6.1 Describe supply and demand terms (e.g., demand, law of demand, supply, law of supply, law of supply and demand, buyer's market, seller's market, elasticity, elastic demand, inelastic demand)
3.6.2 List the conditions required for demand to exist
3.6.3 Describe how the laws of supply and demand effect business
3.6.4 Identify factors that affect elasticity
3.6.5 Describe factors that affect demand/supply

Competency 3.7: Describe the concept of price
Key Indicators:
3.7.1 Describe pricing terms (e.g., price, relative prices, incentives, rationing, equilibrium price, excess supply, excess demand, market price)
3.7.2 Describe relative prices
3.7.3 Explain significance of relative prices to businesses and to consumers
3.7.4 Discuss relationship of relative prices to the economy
3.7.5 Explain how prices are determined
3.7.6 Explain how producers respond to excess supply/demand

Competency 3.8: Examine characteristics of business
Key Indicators:
3.8.1 Discuss current trends and changing nature of business (e.g., population, social issues)
3.8.2 Describe how competition effects business operations (e.g., local, national, global)
3.8.3 Explore characteristics of a free enterprise system

Competency 3.9: Demonstrate knowledge of business operation
Key Indicators:
3.9.1 Determine factors affecting business risk and profit
3.9.2 Explain concepts of competition and productivity
3.9.3 Analyze impact of specialization/division of labor on productivity

Competency 3.10: Explain concept of organized labor and business
Key Indicators:
3.10.1 Describe labor terms (e.g., labor union, local, national, federation, collective bargaining, strikes, picketing, boycotts, featherbedding, lockouts, injunctions, strikebreakers)
3.10.2 Identify types of labor issues
3.10.3 Classify types of unions and levels of union organization

Competency 3.11: Apply business economic concepts
Key Indicators
3.11.1 Identify economic resources
3.11.2 Analyze the functions of money
3.11.3 Identify the difference between economics and economic activities
3.11.4 Identify the relationship between business, society, and government
3.11.5 Apply the concept of economic goods and services to given business situations
3.11.6 Apply the concept of utility to given business situations
3.11.7 Apply the concept of supply and demand to given business situations
3.11.8 Apply the concepts of competition to given business situations
3.11.9 Apply the concept of price to given business situations
3.11.10 Apply the concept of opportunity cost to given business situations

Competency 3.12: Examine issues related to managing economic resources
Key Indicators:
3.12.1 Identify the types of economic systems
3.12.2 Analyze the interdependence between government and business
3.12.3 Identify the factors that influence management decisions
3.12.4 Track work flow using flow charts

Competency 3.13: Analyze economic indicators and trends
Key Indicators:
3.13.1 Identify business cycles
3.13.2 Investigate the nature of current and past economic problems
3.13.3 Identify leading indicators
3.13.4 Identify lagging indicators

Competency 3.14: Explain measures used to analyze economic conditions
Key Indicators:
3.14.1 Describe: unemployment rate, frictional unemployment, structural unemployment, cyclical unemployment, seasonal unemployment, technological unemployment, full employment, inflation rate, price level, interest rate
3.14.2 Describe cost of unemployment for a nation
3.14.3 Describe causes of inflation and recession

3.14.4 Explain how inflation impacts the economy
3.14.5 Explain the impact of interest rate fluctuations on an economy

Competency 3.15: Explain the role of the Consumer Price Index (CPI) in business
Key Indicators:
3.15.1 Describe Consumer Price Index
3.15.2 Describe how the Consumer Price Index is determined and how it changes
3.15.3 Identify major kinds of consumer spending that make up the Consumer Price Index
3.15.4 Explain how the Consumer Price Index is used to find the rate of inflation
3.15.5 Describe limitations on the use of the Consumer Price Index
3.15.6 Explain how price instability affects economic performance

Competency 3.16: Explain the concept of Gross Domestic Product (GDP)
Key Indicators:
3.16.1 Describe: gross domestic product (GDP), personal consumption expenditures, gross private domestic investment, government purchases of goods and services, net exports of goods and services, trade deficit, trade surplus, uncounted production, underground economy, double counting
3.16.2 Identify categories of goods and services that make up GDP
3.16.3 Describe problems encountered in calculating GDP
3.16.4 Explain importance of a country's GDP
3.16.5 Describe ways to increase GDP

Competency 3.17: Describe the nature of current economic problems
Key Indicators:
3.17.1 Describe: balanced budget, budget deficit, federal budget, comparable worth, deregulation, equal employment, global competition, national debt, pollution, poverty, suburban flight, urban blight
3.17.2 Identify examples of current economic problems that affect a community
3.17.3 Explain causes of current economic problems
3.17.4 Draw conclusions about prices by interpreting the Consumer Price Index over a 10-year period
3.17.5 Determine inflation rates
3.17.6 Calculate unemployment rates
3.17.7 Identify possible solutions to current economic problems

Competency 3.18: Explain the nature of international trade
Key Indicators:
3.18.1 Describe: imports, exports, international trade, absolute advantage, and comparative advantage
3.18.2 Describe reasons that international trade takes place
3.18.3 List gains from international trade
3.18.4 Identify ways in which the U.S. economy is affected by international trade

3.18.5 Describe types of trade barriers
3.18.6 Explain techniques used by governments to improve international trade relations

Competency 3.19: Identify the impact of cultural and social environments on world trade

Key Indicators:

3.19.1 Describe: culture, beliefs, values, assumptions, cultural baggage, business subculture, family unit, gender roles, family-work relationships, mobility, class system, language, customs, social relationships
3.19.2 Explain why business subcultures shape the behaviors of business people
3.19.3 Describe how culture influences the components of social organization
3.19.4 Explain how culture influences communication
3.19.5 Describe the impact of values on culture
3.19.6 Explain the importance of understanding the culture of international trading partners

Competency 3.20: Evaluate influences on a nation's ability to trade

Key Indicators:

3.20.1 Describe: trade sanctions, expropriation, economic nationalism, civil unrest, exchange rates, literacy level, agricultural dependency, industrialized countries, less-developed countries, developing countries, and infrastructure
3.20.2 Describe the impact of political risk on a nation's ability to trade
3.20.3 Explain the impact of economic risks on a nation's ability to trade
3.20.4 Describe factors that affect a nation's ability to trade, (e.g., government policies, geographic location, fluctuating interest rates)
3.20.5 Describe factors that influence a nation's level of economic development
3.20.6 Compare/contrast the economic development of less-developed, developing, and industrialized countries
3.20.7 Explain the impact of a country's infrastructure on its ability to trade

Instructional Unit 4: Business Communications

Competency 4.1: Explain nature of effective communication
Key Indicators:
4.1.1 Explain importance of effective communication in business
4.1.2 Identify characteristics of effective communication
4.1.3 Identify barriers to effective communication
4.1.4 Describe techniques for overcoming barriers to effective communication
4.1.5 Differentiate between fact, judgment, and inference
4.1.6 Discuss issues with electronic communications (e.g., no reflection of voice tone, potential for forwarding information)

Competency 4.2: Apply effective listening skills
Key Indicators:
4.2.1 Describe importance of listening to others
4.2.2 Discuss barriers to effective listening
4.2.3 Explain elements of effective listening
4.2.4 Practice active listening

Competency 4.3: Use proper grammar and vocabulary
Key Indicators:
4.3.1 Use correct subject/verb agreement in sentences
4.3.2 Use correct noun/pronoun agreement in sentences
4.3.3 Use correct use of adverbs and adjectives in sentences
4.3.4 Use correct word usage in sentences
4.3.5 Explain importance of a technical vocabulary
4.3.6 Explain the consequences of excessive use of jargon
4.3.7 Explain relationship of business success to proper grammar
4.3.8 Demonstrate proper use of grammar and vocabulary

Competency 4.4: Explain the nature of effective verbal communication
Key Indicators:
4.4.1 Explain importance of effective verbal communication in business
4.4.2 Describe how nonverbal communication affects verbal messages
4.4.3 Explain importance of voice in communicating with others

Competency 4.5: Address people properly
Key Indicators:
4.5.1 Identify situations in which business employees need to address others in a businesslike manner
4.5.2 Explain importance of addressing others in a businesslike manner

Competency 4.6: Handle telephone calls in a businesslike manner
Key Indicators:
4.6.1 Describe proper verbal skills needed to handle telephone calls
4.6.2 Explain standard procedures for taking phone messages
4.6.3 Describe procedures for handling telephone calls in a businesslike manner (e.g., professionalism, consider inflection in voice, attitude conveyed)

Competency 4.7: Make oral presentations
Key Indicators:
4.7.1 Identify occasions when oral presentations are required
4.7.2 Explain the importance of communication skills in oral presentations (e.g., speaking clearly, using correct grammar, using appropriate gestures with audience contact)
4.7.3 Describe characteristics of effective oral presentations
4.7.4 Discuss role of visual support in making oral presentations
4.7.5 Demonstrate procedures for making oral presentations
4.7.6 Use technology to enhance oral presentations

Competency 4.8: Utilize written communication
Key Indicators:
4.8.1 Explain importance of effective written communication
4.8.2 Prepare written communication
4.8.3 Identify types of written communication used in business
4.8.4 Identify characteristics of effective written communication (e.g., brevity neatness/accuracy when using written communication in business)

Competency 4.9: Use communication technologies/systems (e.g., e-mail, facsimile transaction [FAX], voice mail, cell phones, conference calling, answering systems, teleconferencing)
Key Indicators:
4.9.1 Identify communication technologies/systems often used in businesses
4.9.2 Describe benefits of communications technologies/systems
4.9.3 Explain procedures for using communications technologies/systems
4.9.4 Demonstrate use of communications technologies/systems
4.9.5 Discuss legal implications of using electronic equipment

Competency 4.10: Communicate using telecommunications tools
Key Indicators
4.10.1 Identify company policies regarding use of telecommunications tools (telephones, answering machine, voice mail, e-mail, teleconferencing systems)
4.10.2 Operate telecommunications equipment in accordance with company policy
4.10.3 Communicate via telephones, voice mail, e-mail, teleconferencing systems
4.10.4 Keep up-to-date concerning new and emerging communications technologies

4.10.5 Take complete and accurate telephone messages
4.10.6 Deliver phone messages according to criticality of message
4.10.7 Follow established telephone etiquette

Competency 4.11: Communicate effectively following company guidelines in the business environment

Key Indicators:
4.11.1 Follow directions
4.11.2 Describe guidelines for communicating with other employees (e.g., protocol of communications, types of information transmitted via different channels of staff communications, importance of effective state communications to business)
4.11.3 Explain use of interdepartmental/company communication
4.11.4 Give directions for completing job tasks
4.11.5 Conduct meetings

Competency 4.12: Demonstrate ethical behavior in workplace communication
Key Indicators:
4.12.1 Respect the privacy of others
4.12.2 Describe ethical considerations in providing information
4.12.3 Demonstrate procedures for treating others fairly in the workplace (e.g., with gender, sexual orientation, physical condition, ethnic heritage, lifestyle, harassment)
4.12.4 Demonstrate guidelines for developing cultural sensitivity

Competency 4.13: Foster positive working relationships
Key Indicators:
4.13.1 Describe work related terms (e.g., human relations, interdependence, defeatist attitude, inferior attitude, superiors attitude, mature attitude, authoritarian leaders, democratic leaders, laissez-faire leaders)
4.13.2 Describe importance of effective human relations at work
4.13.3 Identify skills needed to develop effective relationships
4.13.4 Discuss significance of interdependence among workers
4.13.5 Describe leadership styles
4.13.6 Explain actions employees should take to establish effective working relationships with each leadership style

Competency 4.14: Demonstrate teamwork
Key Indicators:
4.14.1 Distinguish between teams and groups
4.14.2 Identify types of teams used by businesses (e.g., standing committee, short-term committee, quality circles, project teams, work teams)
4.14.3 Explain importance of teams
4.14.4 Participate as a contributing team member

Competency 4.15: Explain nature of positive customer/client relations
Key Indicators:
4.15.1 Discuss importance of positive customer/client relations
4.15.2 Describe techniques for building positive customer/client relations
4.15.3 Explain nature of customer inquiries
4.15.4 Describe guidelines for handling customer inquiries
4.15.5 Demonstrate use of proper procedure for solving a customer inquiry

Competency 4.16: Explain the nature of organizational change
Key Indicators:
4.16.1 Describe types of organizational change (e.g., term organizational change, reactive change, planned change)
4.16.2 Identify forces that create the need for organizational change
4.16.3 Explain barriers to organizational change
4.16.4 Describe management techniques for overcoming the barriers to organizational change
4.16.5 Explain guidelines for implementing planned organizational change

Competency 4.17: Describe the nature of organizational conflict
Key Indicators:
4.17.1 Explain types of conflict within organizations
4.17.2 Explain causes of organizational conflict
4.17.3 Explain consequences of conflict on organizations
4.17.4 Describe steps for conflict resolution

Competency 4.18: Build customer and coworker relations
Key Indicators:
4.18.1 Provide needed information to customers and coworkers in a considerate and respectful manner
4.18.2 Project a professional business image (e.g., appearance, voice, grammar, word usage, enunciation, nonverbal communication)
4.18.3 Gather information needed for international business communication
4.18.4 Demonstrate business professionalism through the use of appropriate manners in accordance with established protocols and company policies

Competency 4.19: Build customer service
Key Indicators:
4.19.1 Identify organization's products and services including own strengths as a sales agent
4.19.2 Recognize the importance of all customers to the business
4.19.3 Determine customers' individual needs
4.19.4 Interact with customers in a professional manner (e.g., prompt, friendly, courteous, helpful, knowledgeable, understandable)

4.19.5 Follow through on commitments made to customers (e.g., special orders, delivery specifications, new items)
4.19.6 Communicate business policies to customers
4.19.7 Handle merchandise returns in accordance with customer service policy
4.19.8 Handle merchandise complaints in accordance with customer service policy
4.19.9 Facilitate customer service through the maintenance of key information systems
4.19.10 Maintain customer base

Competency 4.20: Deliver business presentations
Key Indicators:
4.20.1 Identify types of presentations for business use
4.20.2 Outline presentations
4.20.3 Enhance presentation delivery using various types of technology
4.20.4 Project a professional business image (e.g., appearance, voice, grammar, word usage, enunciation, nonverbal communication)

Competency 4.21: Prepare written business documents
Key Indicators:
4.21.1 Prepare written business documents using various formats (e.g., letters, thank-you notes, acknowledgments, transcripts, memorandums)
4.21.2 Prepare complex written reports (e.g., research, analysis, legal)

Instructional Unit 5: Accounting

Competency 5.1: Complete the accounting cycle
Key Indicators:
5.1.1 Describe terminology in the accounting cycle
5.1.2 Analyze transactions using source documents
5.1.3 Explain double-entry system of accounting
5.1.4 Apply debit and credit rules when analyzing business transactions
5.1.5 Prepare a chart of accounts
5.1.6 Apply debit and credit rules when recording business transactions
5.1.7 Analyze differences in the uses of credit cards, debit cards, installment loans, term loans, and commercial loans
5.1.8 Journalize transactions using various journal formats
5.1.9 Post transactions to general ledger
5.1.10 Post adjustments (e.g., accruals, deferrals)
5.1.11 Prepare a trial balance
5.1.12 Post transactions to subsidiary ledgers
5.1.13 Prepare accounting reports (e.g., balance sheets, income statements, worksheets)
5.1.14 Use spreadsheets and accounting software to maintain accounting records

Competency 5.2: Apply generally accepted accounting principles to determine the value of assets, liabilities, and owner's equity
Key Indicators:
5.2.1 Create/maintain accounts receivable subsidiary ledger
5.2.2 Apply appropriate accounting concepts and techniques for acquisition, depreciation, and disposal of property
5.2.3 Create/maintain accounts payable subsidiary ledger
5.2.4 Record mortgage and lease obligations and subsequent principal and interest payments
5.2.5 Apply appropriate accounting techniques to account for investments and withdrawals by owners
5.2.6 Determine inventory valuation according to different plans including LIFO (last in; first out), FIFO (first in; first out), specific identification, and weighted average

Competency 5.3: Maintain cash control
Key Indicators:
5.3.1 Identify cash control procedures (e.g., signature cards, deposit slips, internal/external controls, check clearing)
5.3.2 Process checks
5.3.3 Reconcile a bank statement
5.3.4 Journalize/post entries to establish and replenish petty cash
5.3.5 Journalize/post entries related to banking activities
5.3.6 Explain the benefits of electronic funds transfer (e.g., automated teller machine [ATM] transactions, debit cards, direct deposits)

Instructional Unit 6: Computation

Competency 6.1: Apply mathematics skills in business operations
Key Indicators:
6.1.1 Solve for unknowns using algebraic equations
6.1.2 Apply number relations (e.g., greater than, less than, equal)
6.1.3 Interpret measurements (e.g., weight, capacity, length, area, volume)
6.1.4 Calculate break-even sales
6.1.5 Calculate discounts and due dates
6.1.6 Calculate percentages
6.1.7 Make estimates based on given data (e.g., time, financial, inventory)
6.1.8 Prove financial data (e.g., checkbooks, cash drawers, accounting forms)

Competency 6.2: Determine mathematical procedures to solve business problems
Key Indicators:
6.2.1 Determine correct mathematical processes to use for various problem situations using correct formula when appropriate
6.2.2 Select/utilize appropriate tools, programs, and/or procedures when solving problems (e.g., calculators, spreadsheets)

Competency 6.3: Use mathematical procedures to calculate wages and benefits
Key Indicators:
6.3.1 Describe math terms/concepts related to the workplace (e.g., gross pay, net pay, Federal Insurance Commission Act [FICA], commissions)
6.3.2 Maintain payroll register and individual earnings records and tax information
6.3.3 Complete employer's quarterly federal tax return/data for employee and employer tax
6.3.4 Calculate fringe benefits
6.3.5 Calculate wage and salary increase plans (e.g., Cost-of-Living Allowance [COLA], merit increases, profit sharing)

Competency 6.4: Interpret data using common statistical procedures
Key Indicators:
6.4.1 Use tables, charts, and graphs (e.g., construct, read, interpret)
6.4.2 Infer data from tables, charts, and graphs
6.4.3 Calculate measures of central tendency (i.e., mean, median, mode)
6.4.4 Construct frequency distribution
6.4.5 Use probability concepts to solve problems involving uncertainty

Competency 6.5: Use mathematical procedures to solve business problems

Key Indicators:

6.5.1 Compute compound interest and the resulting compound amount at the maturity date for savings and investments

6.5.2 Calculate present value of an investment with compound interest

6.5.3 Determine outstanding amount for installment purchases

6.5.4 Determine finance/additional charges, periodic payment, total costs, and APR (annual percentage rate) on an installment contract

6.5.5 Calculate effects of early payoff of an installment plan

6.5.6 Calculate net business purchases with discounts and purchase returns and allowances

6.5.7 Determine dollar amount of markdown, regular selling price, or reduced price when one of the three variables are unknown

Instructional Unit 7: Business Law

Competency 7.1: Examine foundation of business law
Key Indicators:
7.1.1 Explain why laws exist
7.1.2 Compare/contrast ethics, morals, and law
7.1.3 Describe relationship between historical law and current law
7.1.4 Explain use of the *Constitution* and *Bill of Rights* as sources of law
7.1.5 Compare/contrast the United States Constitution with state and local law
7.1.6 Match regulatory agencies with their responsibilities
7.1.7 Describe rights and responsibilities of customers/clients
7.1.8 Compare/contrast the American business law system with systems in other developed countries

Competency 7.2: Explore the American legal system
Key Indicators:
7.2.1 Compare/contrast federal, state, and local court systems
7.2.2 Describe concept of jurisdiction
7.2.3 Explain how jurisdiction applies to the court system
7.2.4 Identify various categories of law (e.g., civil, criminal, corporate)
7.2.5 Compare/contrast the sources of international law
7.2.6 Distinguish between the roles of legal professionals (e.g., judges, lawyers, paralegals)
7.2.7 Explain role of the appellate and supreme courts
7.2.8 Describe how the litigation process works
7.2.9 Explain the advantages and disadvantages of arbitration, mediation, and conciliation
7.2.10 Describe statute of limitations
7.2.11 Identify different areas of civil law that impact businesses (e.g., tort, contract, property law)
7.2.12 Describe different types of business crime (e.g., arson, forgery, embezzlement, insurance fraud, trademark/copyright)

Competency 7.3: Describe the difference between ethics and the law
Key Indicators:
7.3.1 Explain relationship between the law and ethics
7.3.2 Identify consequences of unethical and illegal conduct
7.3.3 Describe effects of ethics in business

Competency 7.4: Discuss the relationships between contract law, law of sales, and consumer law
Key Indicators:
7.4.1 List elements required to create a contract
7.4.2 Determine whether the characteristics of enforceable contract exists
7.4.3 List the ways a contract can be discharged

7.4.4 Describe breach of contract
7.4.5 Differentiate between goods, service, and real property contracts
7.4.6 Identify various types of warranties and how each of the warranties may be excluded or modified
7.4.7 Explain remedies when a breach of contract occurs
7.4.8 Identify rights and responsibilities of consumers
7.4.9 Identify reasons for bankruptcy laws
7.4.10 Explain representation
7.4.11 Describe the different types of bankruptcy (e.g., chapter 7, 11, 13)

Competency 7.5: Describe legal aspects of business formation

Key Indicators:

7.5.1 Identify types of business ownership
7.5.2 Describe powers and duties of partners
7.5.3 Distinguish between the different types of partners (e.g., silent, dormant, secret)
7.5.4 Outline legal procedures for forming and running a sole proprietorship, limited liability company, and general partnership
7.5.5 Describe legislation that affects partnerships (e.g., Uniform Partnership Act Revised Uniform Partnership Act)
7.5.6 Identify how a partnership may be dissolved by the acts of the partners, operation of the law, and order of the court
7.5.7 Explain the difference between a foreign and domestic corporation
7.5.8 Differentiate between types of corporations (e.g., profit, nonprofit, domestic, foreign, alien corporations)
7.5.9 Describe functions of the board of directors/trustees and officers of a corporation with regard to control of corporate affairs
7.5.10 Differentiate between common and preferred stock
7.5.11 Differentiate between types of corporate expansion (e.g., mergers, consolidations, conglomerates)
7.5.12 Describe ways corporate existence may be dissolved
7.5.13 Describe characteristics of a franchise and how it is formed
7.5.14 Describe legal documents necessary to operate a company (e.g., by-laws, code of regulations)

Competency 7.6: Describe functions of commercial paper, insurance, secured transactions, and business bankruptcy

Key Indicators:

7.6.1 Explain essential elements of a negotiable instrument
7.6.2 Describe different types of endorsements
7.6.3 Explain contractual relationship between a bank and its customers
7.6.4 Describe legal effect of forgeries and material alterations
7.6.5 Explain difference between negotiation of order paper and negotiation of bearer paper
7.6.6 Compare different types of life insurance (e.g., ordinary, limited payment, endowment, term)

7.6.7 Compare different types of property insurance (e.g., automobile, homeowner's, marine)
7.6.8 Explain differences in health insurance coverage
7.6.9 Describe a secured transaction
7.6.10 Describe collateral (e.g., secured and unsecured)
7.6.11 Discuss various aspects of business bankruptcy (e.g., Chapter 7—Liquidation, Chapter 11—Reorganization, and Chapter 13—Reorganization of Debts)
7.6.12 Describe the Uniform Commercial Code
7.6.13 Describe how secured transactions must be recorded to make them enforceable (e.g., State Secretary of State, County Recorder's Office)
7.6.14 Explain trademark and copyright law
7.6.15 Describe federal agencies which monitor corporate transactions
7.6.16 Explain a security
7.6.17 Explain the primary function of the United States Securities Exchange Commission and the National Association of Securities Dealers
7.6.18 Name/describe the federal acts with which companies and individuals must comply in order to sell securities
7.6.19 Describe the due diligence process

Instructional Unit 8: Technology

Competency 8.1: Utilize computer hardware
Key Indicators:
8.1.1 Identify different types of computers
8.1.2 Describe how computers work and process information
8.1.3 Explain how individual computers fit into large systems
8.1.4 Identify the function of computer hardware components
8.1.5 Identify common problems associated with individual components
8.1.6 Identify issues related to computer performance and how it is affected by different components of the computer
8.1.7 Identify the factors that go into a decision on how to purchase a computer

Competency 8.2: Discuss various types of computer software
Key Indicators:
8.2.1 Identify how software works and how software and hardware work together to perform computing tasks
8.2.2 Identify different types of software (e.g., presentation software, accounting software, database software, scheduling software, instant messaging, video conferencing, virus protection software, image manipulation software, document management software)
8.2.3 Describe the tasks for which each type of software is most suited

Competency 8.3: Use computer operating systems
Key Indicators:
8.3.1 Identify types of operating systems
8.3.2 Describe how an operating system works
8.3.3 Manipulate the vendor-specific desktop, files, and disks
8.3.4 Be able to change system settings
8.3.5 Install/uninstall software

Competency 8.4: Use applications
Key Indicators:
Common Program Functions
8.4.1 Start/exit a vendor-specific application
8.4.2 Utilize sources of online help
8.4.3 Identify common on-screen elements of vendor-specific applications
8.4.4 Change applications settings
8.4.5 Manage files within an application
8.4.6 Perform common editing (e.g., cut, copy, paste, spellcheck)
8.4.7 Perform common printing functions

Word Processing Functions

8.4.8 Format text and documents
8.4.9 Utilize automatic formatting or override automatic formatting
8.4.10 Add tables and graphics to documents

Spreadsheet Functions

8.4.11 Modify worksheet data and structure
8.4.12 Sort data and manipulate data using formulas and functions
8.4.13 Format a worksheet
8.4.14 Add pictures and charts to a worksheet

Competency 8.5: Utilize on-line functions

Key Indicators:

8.5.1 Access networks and the Internet
8.5.2 Identify network fundamentals and the benefits and risks of network computing
8.5.3 Identify the relationship between computer networks, other communication networks (telephone), and the Internet

Competency 8.6: Utilize electronic mail

Key Indicators:

8.6.1 Identify how electronic mail works
8.6.2 Identify how to use an electronics mail application
8.6.3 Identify the appropriate use of e-mail
8.6.4 Discuss e-mail related etiquette
8.6.5 Send/receive/store e-mail messages

Competency 8.7: Utilize the Internet

Key Indicators:

8.7.1 Identify different types of information sources on the Internet
8.7.2 Use a Web browsing application
8.7.3 Search the Internet for information

Competency 8.8: Assess impact of technology on the workplace

Key Indicators:

8.8.1 Explain the benefits and drawbacks of technological advancements
8.8.2 Describe how new developments in technology affect the supply/demand characteristics of the job market
8.8.3 Describe how technology has changed organization structures
8.8.4 Describe how technology has transformed business processes and relationships
8.8.5 Describe how technology has changed the manner in which training is offered and implemented
8.8.6 Evaluate technological developments that have changed the way people perform their tasks and assignments

8.8.7 Research future trends in technology
8.8.8 Determine current technology needs for various types of businesses

Competency 8.9: Use references and data from technological sources (e.g., gather, evaluate, use, cite)

Key Indicators:

8.9.1 Use technology resources to retrieve information, (e.g., compact discs, Internet, DVDs [Digital Video Disc])
8.9.2 Use search procedures appropriate to type of information, nature of source, and nature of query
8.9.3 Evaluate credibility and bias of information sources
8.9.4 Use information in decision making
8.9.5 Cite sources of all types of data

Competency 8.10: Adhere to laws governing technology

Key Indicators:

8.10.1 Determine when a software program can be protected by labeling it a trade secret
8.10.2 Determine when a software program can be protected by a patent or copyright
8.10.3 Identify the circumstances that constitute the violation of a software program copyright
8.10.4 Determine when computer-related contracts are service contracts and when they are sale-of-goods contracts
8.10.5 Explain how the law can be used to prevent the use of computers to invade privacy
8.10.6 Discuss impact of the laws of different countries on computer law

Competency 8.11: Develop skills and knowledge needed to obtain technical support services

Key Indicators

8.11.1 Use a logical and structured approach to isolate and identify problem sources and resolve problems
8.11.2 Use resources for problem identification and resolution (e.g., hardware, software, online)
8.11.3 Use technical computer language to communicate with support technicians
8.11.4 Recognize need to maintain technical currency and the need to grow professionally

Competency 8.12: Abide by risk-management policies and procedures for technology

Key Indicators:

8.12.1 Adhere to safety and security policies (e.g., acceptable use policy, Web page policies)
8.12.2 Apply ergonomic techniques to technology tasks
8.12.3 Adhere to federal and state laws that apply to safety and security including laws pertaining to computer crime, fraud, and abuse

8.12.4 Follow procedures used to restart and recover from situations (e.g., system failure, virus infection)
8.12.5 Follow policies regarding controls to prevent loss of integrity of data and other information resources

Competency 8.13: Follow policies for managing privacy and ethical issues in organizations

Key Indicators:

8.13.1 Adhere to organization policies for privacy and intellectual property
8.13.2 Demonstrate legal and ethical behaviors when using technology
8.13.3 Explain consequences of illegal and unethical use of technology
8.13.4 Explain property, privacy, access, and accuracy issues pertaining to technology, including the impact of these issues on individuals and organizations

Competency 8.14: Apply technology to business applications

Key Indicators:

8.14.1 Determine the appropriate software application for task
8.14.2 Apply advanced word processing skills to design work place documents (e.g., mail merge, tables, macros, envelopes, labels)
8.14.3 Design and manage database for workplace applications (e.g., query, filter, sort, merge, reports)
8.14.4 Design spreadsheets for workplace applications (e.g., templates, macros, formulas, functions, graphs, charts, links)
8.14.5 Produce multimedia presentation for the workplace (e.g., sound bytes, animation, transition, image download or import, video)
8.14.6 Produce workplace documents using desktop publishing software
8.14.7 Manipulate image files
8.14.8 Create a webpage for business applications
8.14.9 Maintain electronic files (e.g., server, workstation, shared files)
8.14.10 Capture text using OCR (optical character reader) software
8.14.11 Produce documents using voice recognition technology
8.14.12 Maintain and troubleshoot computer workstation (e.g., install software, download plug-ins, defrag hard drive, run scan disk, delete temporary and other unnecessary files, change ink cartridges and toner, scan for viruses, troubleshoot common problems)
8.14.13 Complete workplace applications that integrate word processing (e.g., spreadsheets, database, multimedia software)

Competency 8.15: Use Internet as a business tool

Key Indicators:

8.15.1 Distinguish between Internet and Intranet
8.15.2 Use e-mail to send and receive messages and attachments
8.15.3 Demonstrate appropriate Internet uses for business (e.g., copyright, netiquette, privacy issues, ethics)

8.15.4 Analyze basic components of an electronic business website
8.15.5 Identify advantages and disadvantages of electronic business procedures (e.g., e-commerce)

Instructional Unit 9: International Business

Competency 9.1: Explain impact of international business

Key Indicators:

9.1.1 Describe impact of international business activities on the local, state, national, and international economics

9.1.2 Discuss impact of emerging economies and political changes on international operations

9.1.3 Determine impact of geography on international business (e.g., climate; time zones, distance; topography; and social, economic, religion, natural resources)

9.1.4 Explain relationships of major trade alliances with each other

Competency 9.2: Apply communication strategies necessary for effective and profitable international business relations

Key Indicators:

9.2.1 Identify basic words and phrases in languages used in business throughout the world

9.2.2 Identify business challenges related to people speaking various languages

9.2.3 Explain conversation modifications for communicating with a person who speaks English as a second language

9.2.4 Explain the usage of names, titles, and ranks in different cultures and countries

9.2.5 Discuss international business blunders resulting from ineffective or incorrect communication patterns

9.2.6 Identify cultural differences in food, dress, and social behaviors throughout the world

9.2.7 Identify major holidays of various cultures and the impact on doing business internationally

9.2.8 Identify appropriate use of gift giving in business relationships in various cultures

9.2.9 Compare business protocol in various countries

9.2.10 Identify cultural attitudes about time, silence, space, and body and eye contact in relation to successful international business relationships

9.2.11 Describe how process of negotiating may be affected by cultural differences

9.2.12 Describe role and use of electronic communication tools (e.g., Internet, video-and computer-conferencing, webcasts, email) in international business activities

Instructional Unit 10: Management

Competency 10.1: Identify business management practices

Key Indicators:

10.1.1 Identify functions of management

10.1.2 Identify management levels and their role in the organization

10.1.3 Identify areas of management and their relationship to business functions (e.g., human resources, financial, facility inventory, information systems, logistics, accounting)

Competency 10.2: Discuss management functions and their integration within the business functions

Key Indicators:

10.2.1 Identify key management functions (e.g., planning, organizing, leading/directing, evaluating/controlling)

10.2.2 Discuss importance of vision, mission, and goal setting within the context of the business environment

10.2.3 Describe role of the strategic planning process

10.2.4 Identify business plan components

10.2.5 Explain how management uses various resources in the organizing process to accomplish goals

10.2.6 Describe how organizations provide accountability by delegating authority and assigning responsibility

10.2.7 Differentiate between leading and managing

10.2.8 Discuss various leadership styles

10.2.9 Discuss management skills necessary for leading/directing at various management levels

10.2.10 Discuss importance of the evaluating/controlling function in the business environment

10.2.11 Discuss alternative actions when goals are not being met for a specific situation (e.g., changing goals and strategies)

10.2.12 Discuss measurements of performance

10.2.13 Identify the impact that various employment and social laws may have on leading and managing business

Competency 10.3: Explain management theories and their application with the business environment

Key Indicators:

10.3.1 Discuss management theories

10.3.2 Identify motivation theories that impact management (e.g., Maslow and Herzberg)

10.3.3 Describe interaction between management levels

10.3.4 Discuss interrelationships of a variety of organizational models (e.g., line, line and staff, functional)

10.3.5 Describe line versus staff departments and the authority relationship between them

10.3.6 Describe effects of group dynamics on group decision making and consensus building

Competency 10.4: Describe human resource functions and their importance to an organization's successful operation

Key Indicators:

10.4.1 Identify activities of the human resource unit
10.4.2 Describe how workplace legislation has changed the workplace (e.g., Affirmative Action, Right-to-privacy, Americans with Disabilities Act [ADA])
10.4.3 Identify tools used in the recruitment and selection of employees
10.4.4 Identify legislation affecting the recruitment and selection process
10.4.5 Explain why orientation and training are needed for successful employee performance
10.4.6 Discuss why professional development is a shared responsibility between a business and an employee
10.4.7 Identify value of cross-training
10.4.8 Explain employee evaluation process
10.4.9 Identify impact of performance appraisals on employees
10.4.10 Identify compensation plans, benefit packages, and incentive programs available to employees
10.4.11 Identify advancement opportunities within an organization
10.4.12 Discuss concept of rightsizing
10.4.13 Discuss how internal and external factors affect rightsizing (e.g., economy, compensation, government regulations)
10.4.14 Describe collective-bargaining process
10.4.15 Explain the changing roles of labor unions
10.4.16 Describe legal strategies used by labor and management (e.g., strikes, boycotts, layoffs, lockouts)

Instructional Unit 11: Marketing

Competency 11.1: Explain impact of marketing activities on the individual, business, and society

Key Indicators:

11.1.1 Describe how a successful marketing strategy is built on positive customer relations
11.1.2 Identify elements of the marketing mix (e.g., product, price, place, promotion)
11.1.3 Describe the wide scope of marketing (e.g., business-to-consumer, business-to-business, industrial, nonprofit, personal, government, electronic)
11.1.4 Describe importance of marketing in a global society

Competency 11.2: Describe characteristics, motivations, and behaviors of consumers

Key Indicators:

11.2.1 Describe impact of consumer differences (e.g., life stages and socioeconomic characteristics) on buying decisions
11.2.2 Differentiate among types of consumers and other types of consumers (e.g., government, business, industry, nonprofit)
11.2.3 Describe characteristics of the changing domestic and global population (e.g., demographics, ethnographics, geographic, psychographics)
11.2.4 Differentiate between rational (cognitive) and emotional (affective) buying motives
11.2.5 Identify ways that appearance of business (to include professional offices, online businesses, and in-store businesses) impact a customer's perceptions and expectations
11.2.6 Identify the tools of market segmentation (e.g., demographics, ethnographics, psychographics, geographics)
11.2.7 Explain ways that segmentation can be used to identify target markets

Competency 11.3: Describe influence of external factors on marketing

Key Indicators:

11.3.1 Discuss impact of changing economic conditions on marketing strategies
11.3.2 Describe ways competition affects marketing decisions
11.3.3 Explain competitive situations and impact they have on marketing decisions (e.g., monopolistic, oligopolistic, pure competition)
11.3.4 Identify special interest groups concerned with marketing policy (e.g., stockholders, consumer groups, labor groups, environmental groups)
11.3.5 Discuss ways in which marketers may respond to the concerns of special interest groups

Competency 11.4: Discuss elements of the marketing mix and how they are used in the marketing process

Key Indicators:

11.4.1 Identify elements of the marketing mix (e.g., products, price, place, promotion)
11.4.2 Discuss each element and how it is interrelated with other elements of the marketing mix

Competency 11.5: Describe elements, design, and purposes of the marketing plan
Key Indicators:
11.5.1 Explain why a marketing plan is essential
11.5.2 Identify the components of a marketing plan
11.5.3 Discuss why a marketing plan is not a static document

Competency 11.6: Evaluate marketing concepts
Key Indicators:
11.6.1 Identify marketing functions and related activities
11.6.2 Analyze market segmentation and its role in the marketing plan
11.6.3 Identify the purposes and functions of the marketing plan
11.6.4 Analyze the effects of marketing
11.6.5 Identify current trends in marketing and their effects on business operations
11.6.6 Analyze promotional planning strategies

Competency 11.7: Examine the role of the selling process
Key Indicators:
11.7.1 Identify the elements necessary to convey a professional appearance and businesslike image
11.7.2 Determine strategies for identifying your audience/clients and their needs and motives
11.7.3 Determine strategies for analyzing competitors' offerings
11.7.4 Identify sales support services and the benefits for customers
11.7.5 Interpret business policies so they can be understood by customers/clients
11.7.6 Demonstrate knowledge of products/services
11.7.7 Determine strategies for feature-benefit selling
11.7.8 Identify the important of each person's role in the selling process

Instructional Unit 12: Entrepreneurship

Competency 12.1: Identify factors to be considered by a potential entrepreneur
Key Indicators:
12.1.1 Identify characteristics of a successful entrepreneur
12.1.2 Examine rewards and risks of owning a business
12.1.3 Discuss trade-offs between the roles of a manager and an entrepreneur
12.1.4 Identify unique contributions of entrepreneurs to the economy of a country
12.1.5 Explain feasibility of starting a home-based or Internet-based business
12.1.6 Describe the different styles of hierarchy
12.1.7 Review roles of each level of the hierarchy
12.1.8 Explain how each level of the hierarchy impacts the business

Competency 12.2: Apply economic concepts when making decisions for an entrepreneurial venture
Key Indicators:
12.2.1 Compare/contrast the different types of market structures (e.g., competition, monopoly)
12.2.2 Assess how market prices ration goods and services among those who want them
12.2.3 Assess how market prices provide an incentive to produce goods and services
12.2.4 Discuss how prices are determined for products/services

Competency 12.3: Discuss how forms of business ownership, government regulations, and business ethics affect entrepreneurial ventures
Key Indicators:
12.3.1 Compare rewards and risks of buying an existing business, starting an entirely new business, or purchasing a franchise
12.3.2 Compare rewards and risks of the various forms of business ownership
12.3.3 Identify impact of government regulations on business
12.3.4 Identify strategies that facilitate ethical behavior in a small business
12.3.5 Identify potential consequences of unethical business practices

Competency 12.4: Analyze financial data
Key Indicators:
12.4.1 Analyze financial reports both electronically and manually (e.g., profit/loss statements, balance sheets)
12.4.2 Evaluate cost-profit relationships
12.4.3 Predict financial outcomes relative to business decisions and financial data

Competency 12.5: Analyze credit issues
Key Indicators:
12.5.1 Analyze differences in the uses of credit cards, debit cards, installment loans, term loans, and commercial loans
12.5.2 Determine factors involved in issuing credit
12.5.3 Identify the components of credit reports

Competency 12.6: Develop a financial plan
Key Indicators:
12.6.1 Identify components of a financial plan
12.6.2 Compare various sources of capital and types of loans
12.6.3 Compare methods of financing given business and personal endeavors
12.6.4 Set long-term financial goals and objectives (e.g., business, personal)

Competency 12.7: Perform banking functions
Key Indicators:
12.7.1 Maintain a checkbook using proper reconciliation methods
12.7.2 Complete bank deposits/records
12.7.3 Inspect currency for counterfeit bills, check authenticity, credit card fraud, smart card fraud, check card fraud, and electronic currency fraud
12.7.4 Calculate the cost of accepting credit cards

Competency 12.8: Apply analytical skills in business operations
Key Indicators:
12.8.1 Determine information needed to solve problems and make decisions
12.8.2 Determine whether information is sufficient, insufficient, or extraneous when solving business problems
12.8.3 Interpret data to solve problems and make decisions
12.8.4 Apply information from tables, charts, and graphs to problem solving and decision-making
12.8.5 Interpret work-flow and organizational charts
12.8.6 Apply logic skills to business decisions

Competency 12.9: Identify key elements of business organizations
Key Indicators:
12.9.1 Identify the parts of a business plan
12.9.2 Identify the relationship between the business plan and the business organization
12.9.3 Identify current trends in various industries
12.9.4 Identify types of business ownership and the characteristics of each
12.9.5 Identify advantages and disadvantages of various types of business ownership
12.9.6 Identify forms of international business activities
12.9.7 Identify barriers of international trade

Competency 12.10: Identify business management practices
Key indicators:
12.10.1 Identify functions of management
12.10.2 Identify management levels and their role in the organization
12.10.3 Identify areas of management (e.g., human resources, financial, facility, inventory, information systems, logistics)

Competency 12.11: Perform scheduling functions
Key Indicators:
12.11.1 Maintain appointment calendars (e.g., written and electronic)
12.11.2 Maintain schedules
12.11.3 Manage scheduling conflicts
12.11.4 Create calendar/schedule of activities (itineraries)
12.11.5 Identify the need for management across projects

Competency 12.12: Conduct meetings and other group functions
Key Indicators:
12.12.1 Plan meetings
12.12.2 Apply parliamentary procedure
12.12.3 Schedule meetings
12.12.4 Prepare agendas
12.12.5 Make necessary meeting room arrangements
12.12.6 Make arrangements for participants' special needs (e.g., dietary, hearing, vision, handicap access, foreign language needs)
12.12.7 Facilitate meetings
12.12.8 Participate in group discussions and meetings
12.12.9 Communicate roles and responsibilities of committee members and officers

Competency 12.13: Maintain a records management system
Key Indicators:
12.13.1 Develop a system for maintaining necessary company records
12.13.2 Maintain secured and protected filing systems
12.13.3 Store materials within appropriate filing systems
12.13.4 Retrieve requested materials from established filing systems
12.13.5 Archive materials according to company policy
12.13.6 Purge filing systems in accordance with company policy

Competency 12.14: Manage inventory
Key Indicators:
12.14.1 Select inventory control systems(s) (e.g., periodic, perpetual, LIFO [last in, first out], FIFO [first in, first out]) appropriate for inventory needs
12.14.2 Maintain inventory control records and systems

12.14.3 Identify reasons for inventory shrinkage
12.14.4 Prepare inventory records and reports

Competency 12.15: Examine personnel management concepts
Key Indicators:
12.15.1 Identify effective skills and strategies for working with organization and groups of people
12.15.2 Identify the kinds of rewards, incentives, and motivators people seek at work
12.15.3 Identify the roles of formal and informal groups within organizations
12.15.4 Identify the role of performance evaluations

Competency 12.16: Perform shipping and mailing functions
Key Indicators:
12.16.1 Identify various classes of mail and shipments
12.16.2 Identify various shipping services (e.g., priority, insured, certified, registered, overnight)
12.16.3 Identify types of shipping and mailing services (e.g., United Parcel Service [UPS], US Postal Services, private carriers)
12.16.4 Sort/distribute mail or shipments
12.16.5 Identify delivery requirements (e.g., package, domestic, international)
12.16.6 Select delivery method and services appropriate for needs

Medical Office Management TCP

Instructional Unit 1: Professional Development and Networking

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.1: Explore career pathways in medical office management

Key Indicators:

1.1.1 Identify career opportunities for graduates of medical office management program
1.1.2 Research history of management in medical facilities/medical practices
1.1.3 Identify personal characteristics needed for success in medical office setting
1.1.4 Compare/contrast various career areas in the medical office management field

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.2: Participate in professional development opportunities for an employee in a medical office management position

Key Indicators:

1.2.1 Develop personal and professional career goals
1.2.2 Develop mentor relationships
1.2.3 Participate in continuing education to remain current in the profession, and for career advancement (e.g., training meetings, workshops, conferences, professional organizations)
1.2.4 Describe various certifications available to personnel in medical management (e.g., CMM [Certified Medical Manager] via Professional Association of Health Care Office Management], CMPE [Certified Medical practice Executive] via American College of Medical practice Executives], MGMA [Medical Group Management Association], CMOM [Certified Medical Office Management])
1.2.5 Identify professional associations available for medical office employees

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.3: Engage in professional networking
Key Indicators:
1.3.1 Identify networking opportunities internally and externally
1.3.2 Interact with peer professionals

BIL: Essential

EDU:	12	AD
	P	R

Competency 1.4: Read medical office management professional materials
Key Indicators:
1.4.1 Identify medical management resources (e.g., books, periodicals, newsletters)
1.4.2 Discriminate among types of information (e.g., essential, important, critical, nice-to-know, Internet)
1.4.3 Read for full comprehension
1.4.4 Skim read for key points/topical information
1.4.5 Maintain medical management resource/information files

Instructional Unit 2: Communication Skills

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.1: Apply communication skills
Key Indicators:

2.1.1 Develop effective interpersonal skills
2.1.2 Identify confidentiality issues in transmission of sensitive patient records via written facsimile or Internet transfer of information
2.1.3 Ensure accuracy in following written and oral instructions in a medical office setting (e.g., referencing procedures, instructions common in health care professions)
2.1.4 Apply basic rules for grammar, punctuation, and vocabulary usage
2.1.5 Apply basic guidelines for the construction of effective sentences ensuring terminology that is unique to medical offices is used correctly
2.1.6 Ensure word accuracy in communications (e.g., definitions, number referencing or coding)
2.1.7 Apply basic rules governing punctuation, capitalization, abbreviations, word division, and numbers
2.1.8 Refine verbal and nonverbal communication skills that demonstrate professional presentations (e.g., language, voice tone, discussion methods, attitude, body language, sensitivity, empathy)
2.1.9 Apply active listening skills to ensure accuracy, take notes if necessary
2.1.10 Identify cultural differences that may affect communications
2.1.11 Use communications reference tools (e.g., medical references; insurance reference materials, dictionary, style manual, *Thesaurus*, word division guide)
2.1.12 Interact with others learning new tasks (e.g., orders, directions, instructions, task transfer)
2.1.13 Interact with patients in a manner that instills confidence
2.1.14 Apply team concepts
2.1.15 Share positive suggestions with management that might enhance the medical practice's image, service delivery, and efficiency

BIL: Essential

EDU:	12	AD
	P	R

Competency 2.2: Prepare documents
Key Indicators:

2.2.1 Transcribe information from a dictation machine, questioning when necessary to ensure clear understanding of transcription
2.2.2 Draft documents in accordance with guidelines for individual office need and/or format (e.g., memo, letter, e-mail)
2.2.3 Manage data collection for documents
2.2.4 Process consent forms
2.2.5 Ensure quality of completed documents by proofreading, editing, and making corrections
2.2.6 Edit documents that have been input via voice recognition

Instructional Unit 3: Front Office Management

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.1: Function as a self-managed employee
Key Indicators:

3.1.1 Organize tasks to include multiple tasking when possible and to retain effectiveness and accuracy of work
3.1.2 Manage time to maximize efficiency
3.1.3 Manage timeline submissions to comply with deadlines (e.g., filing, applications, reports)
3.1.4 Manage long-term and short-term plans to facilitate smooth flow of work by day, week, or month

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.2: Perform telephone triage
Key Indicators:

3.2.1 Apply telephone techniques in accordance with office protocol
3.2.2 Establish patient's identity
3.2.3 Query patient to identify urgency of needs
3.2.4 Recognize signs and symptoms of an emergency situation
3.2.5 Document phone calls and action taken
3.2.6 Initiate action appropriate for given emergency

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.3: Maintain patient records
Key Indicators:

3.3.1 Operate office equipment (e.g., communication devices, electronic scheduler, transcriber, calculator, checkwriter, typewriter, copy machine, facsimile machine, scanner, audiovisual equipment, postage meter, credit card machine)
3.3.2 File information in accordance with office protocol
3.3.3 Prepare patient records
3.3.4 Process incoming medical reports (e.g., transfer data, photocopy, key information)

3.3.5 Process patient/provider inquiries regarding insurance claims
3.3.6 Store inactive records (e.g., electronic and paper copy)
3.3.7 Audit records (e.g., currency, purge, archive)

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.4: Manage office computer system
Key Indicators:
3.4.1 Use technical software specific to medical setting (e.g., MISYS health care systems; Medisoft Medical Manager, Microsystems, Electronic Medical Records Soft-med, NextGen)
3.4.2 Create/maintain computer dictionary that includes current medical vocabulary
3.4.3 Print patient data (i.e., records, lab reports, charts, graphs)
3.4.4 Manage electronic file system (e.g., backup, purge)
3.4.5 Archive electronic files according to office protocol
3.4.6 Access needed operating information using manufacturers' manuals, software documentation, and other reference materials
3.4.7 Research Internet for information
3.4.8 Maintain procedure manuals with information and updates for hardware and software programs currently used in office
3.4.9 Utilize software "help file"
3.4.10 Access technical assistance when necessary (e.g., electronic, technician)

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.5: Perform reception duties
Key Indicators:
3.5.1 Open and close the office (e.g., front reception, business records)
3.5.2 Monitor office and waiting area for neatness and safety standards
3.5.3 Register/dismiss visitors and patients
3.5.4 Prepare record file for client
3.5.5 Explain office procedures and protocol to patients
3.5.6 Process release forms securing required signatures
3.5.7 Prepare data for referring physician/doctor
3.5.8 Prepare patient billing information
3.5.9 Assist patients with special needs (e.g., physically challenged, hearing- or visually impaired, language barriers, referrals)
3.5.10 Screen non-patient visitors

3.5.11 Explain delays to patients/persons accompanying patients
3.5.12 Process incoming and outgoing mail
3.5.13 Process packages for pickup or mailing
3.5.14 Process packages coming in to the office

BIL: Essential

EDU:	12	AD
	P	R

Competency 3.6: Manage appointment system
Key Indicators:
3.6.1 Use electronic and/or manual scheduling system
3.6.2 Coordinate appointments for specialty treatments
3.6.3 Maintain recall system
3.6.4 Confirm appointments
3.6.5 Facilitate appointments for patients referred to specialists

Instructional Unit 4: Financial Functions

BIL: Essential

EDU:	12	AD
	P	R

Competency 4.1: Perform payroll procedures
Key Indicators:
4.1.1 Calculate time cards
4.1.2 Calculate gross earning
4.1.3 Calculate net earnings
4.1.4 Process payroll
4.1.5 Maintain employee payroll records
4.1.6 Maintain employee tax records
4.1.7 Prepare local, state, and federal quarterly tax reports

BIL: Essential

EDU:	12	AD
	P	R

Competency 4.2: Perform financial duties for the medical office setting
Key Indicators:
4.2.1 Interact with patients regarding accounts
4.2.2 Review insurance coverage with patients
4.2.3 Explain physician/doctor's fees
4.2.4 Arrange financial agreements with patients
4.2.5 Process communications with patients regarding insurance claims
4.2.6 Prepare billing statements
4.2.7 Process fees collected day of service
4.2.8 Process payments on account after services
4.2.9 Compose itemized statements
4.2.10 Issue receipts and quick-claim forms
4.2.11 Perform banking functions (e.g., deposits, withdrawals, automatic payments, automatic transfer funds to/from accounts)
4.2.12 Handle non-sufficient funds checks
4.2.13 Verify invoices for accounts payable
4.2.14 Collect delinquent bills
4.2.15 Post payments
4.2.16 Maintain accounts receivable
4.2.17 Maintain accounts payable
4.2.18 Process credit card transactions
4.2.19 Process refunds

4.2.20 Reconcile cash and receipts
4.2.21 Prepare schedules of accounts receivable
4.2.22 Prepare schedules of accounts payable
4.2.23 Perform electronic billing
4.2.24 Prepare daysheet
4.2.25 Use spreadsheet software for data analysis and graphs
4.2.26 Complete financial reports for managing physician/doctor and/or accountant

Instructional Unit 5: Insurance Claims Management

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.1: Discuss healthcare insurance concepts
Key Indicators:

5.1.1 Explain need for standardized terminology in insurance coding and processing
5.1.2 Define health-care fraud and abuse
5.1.3 Discuss how to avoid being involved in health-care fraud and abuse
5.1.4 Explain how to verify client's eligibility (e.g., claims submission process, insurance card information, eligible coverage)
5.1.5 Define new patient and established patient status
5.1.6 Define preventative services and hospice care
5.1.7 Define terms encountered in health-care claims processing (e.g., case manager, disability insurance, managed care, co-insurance payment, deductible, non-covered procedure, Preferred Provider Organization [PPO], Health Maintenance Organization [HMO], co-pays, co-insurance)
5.1.8 Contrast out-of-network provider vs. in-network provider
5.1.9 Explain difference between primary and secondary provider
5.1.10 Describe *Explanation of Benefits* (EOB) form
5.1.11 Explain how to report fraud and abuse

BIL: Essential

EDU:	12	AD
	P	R

Competency 5.2: Process insurance forms
Key Indicators:

5.2.1 Verify insurance coverage
5.2.2 Determine insurance requirements of individual patient
5.2.3 Use ICD9 (international classification of diseases) and CPT (current procedural terminology) coding systems
5.2.4 Complete required procedures for private insurance carriers
5.2.5 Apply office protocol for self-pay patients (e.g., uninsured, motor vehicle accident, VFC [vaccines for children], federal poverty guidelines)
5.2.6 Complete required procedures for government-insured patients (e.g., workers compensation, Medicare, Medicaid, welfare, insurance waivers, health care financial waivers)
5.2.7 Complete forms specific to the insurance carrier
5.2.8 Complete forms using the coding of the ICD9

5.2.9 Complete forms using the coding of current procedural terminology (CPT), health-care procedural code (HCPC), and/or diagnostic related groups (DRGs)
5.2.10 Process third-party/insurance forms
5.2.11 Report treatment information using established procedure codes provided by insurance company
5.2.12 Compare/contrast ICD9 with ICD 10
5.2.13 Interpret patient records for coding

BIL: Essential

EDU:	12	AD
	I	P

Competency 5.3: Manage insurance records filing system
Key Indicators:
5.3.1 Establish system to track claims
5.3.2 Log/track claims for each client
5.3.3 Maintain file of insurance claim forms
5.3.4 Purge dated insurance information

Instructional Unit 6: Medical Office Ethics

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.1: Comply with professional protocol with regard to legal issues
Key Indicators:

6.1.1 Maintain confidentiality in handling all discretionary issues (e.g., patient information, company information)
6.1.2 Provide information for the *Patient Bill of Rights*
6.1.3 Explain the statute of limitations
6.1.4 Identify legal owner of medical records
6.1.5 Adhere to office and/or governmental policies, procedures, guidelines, and regulations
6.1.6 Adhere to rules of conduct as prescribed in a medical office setting
6.1.7 Recognize sexual harassment and connotations
6.1.8 Assume responsibility for decisions and actions
6.1.9 Discuss nature of supervision that must be present to avoid situations that constitute unauthorized medical practice of medicine
6.1.10 Exhibit behaviors that support the total organizational goals of the medical practice (e.g., optimal performance that enhances services provided)
6.1.11 Identify company privacy policy

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.2: Comply with professional protocol with regard to patient issues
Key Indicators:

6.2.1 Inform patients about the *Truth-in-Lending Law*
6.2.2 Inform patients about the *Anatomical Gift Act*
6.2.3 Inform patients about advance directives (e.g., living wills, powers of attorney)
6.2.4 Inform patients about the meaning of informed consent
6.2.5 Inform patients of the reasons for the termination of patient services
6.2.6 Inform patients about the possible consequences of noncompliance with the doctor/physician's recommendations
6.2.7 Inform patients about remuneration policies and procedures
6.2.8 Provide emotional support for patients and their families
6.2.9 Respond to the needs of patients on an individual basis

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.3: Follow medical ethics when communicating patient data
Key Indicators:

6.3.1 Follow guidelines of *Health Insurance Portability and Accountability Act-1996 [HIPAA]*
6.3.2 Define breach of confidentiality and HIPAA guidelines
6.3.3 Discuss consequences of violating HIPAA guidelines
6.3.4 Discriminate between ethical and unethical disclosure of medical practice and client information
6.3.5 Communicate with physician/doctor and other health-care professionals
6.3.6 Demonstrate knowledge of correct medical vocabulary and abbreviations (e.g., basic anatomy terminology, common procedures, treatments, reports)
6.3.7 Maintain customized list of abbreviations common to health care

BIL: Essential

EDU:	12	AD
	P	R

Competency 6.4: Adhere to established professional work ethics
Key Indicators:

6.4.1 Exhibit professional appearance, manners, and attitude
6.4.2 Follow ethical principles per office protocol
6.4.3 Maintain a positive, professional work attitude in office
6.4.4 Maintain personal health status (e.g., physical, psychological, fitness)
6.4.5 Maintain personal stress level to not interfere with daily tasks
6.4.6 Seek external support, if necessary (e.g., mentor, career counselor)
6.4.7 Accept constructive criticism
6.4.8 Exhibit personal characteristics and behaviors required to be successful in a medical office (e.g., punctuality, dependability, flexibility, loyalty, honesty, self-confidence, respect of self and others, initiative)
6.4.9 Exhibit pride in work
6.4.10 Employ characteristics and responsibilities of teamwork and participating in a democratic process
6.4.11 Adjust to changes in the work environment
6.4.12 Take responsibility for assignments
6.4.13 Participate in staff meetings (e.g., query for clear understanding, document data)
6.4.14 Apply procedures established to minimize liability for the medical practice
6.4.15 Provide customer service
6.4.16 Maintain respect for co-workers, physicians/doctors, and supervisors

Instructional Unit 7: Mid-Level Office Management

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.1: Manage general office medical practices

Key Indicators:

7.1.1 Describe role of mid-level manager in medical and healthcare services office
7.1.2 Align office procedures with the mission, goals, and strategic objectives of the office
7.1.3 Demonstrate leadership, management, interpersonal, and professional skills
7.1.4 Employ established time-management and organizational techniques
7.1.5 Draft office communication for employer/manager review (e.g., evaluation appraisal, recommendations for promotion, disciplinary action or dismissal, documentation for insubordination, breach of security/confidentiality or office ethics)

BIL: Essential

EDU:	12	AD
	I	P

Competency 7.2: Maintain administrative and clinical office supplies in accordance with office protocol

Key Indicators:

7.2.1 Maintain inventory of office supplies
7.2.2 Prioritize office needs with the financial goals of the medical practice and allocation of resources
7.2.3 Evaluate vendors' credentials and products
7.2.4 Confer with sales representatives and vendors
7.2.5 Monitor supply levels (e.g., expendables, non-expendables, equipment replacement parts)
7.2.6 Manage inventory (e.g., order, receive, store)
7.2.7 Prepare purchase requisitions for needed supplies
7.2.8 Maintain file of current MSDS (Materials Safety Data Sheets) applicable to specific office
7.2.9 Maintain warranty information/data
7.2.10 Monitor office technology needs
7.2.11 Monitor routine equipment maintenance and repairs
7.2.12 Maintain current copies of regulations as required by local, state, or federal agencies (e.g., Occupational Safety and Health Administration [OSHA], Environmental Protection Agency [EPA])

Instructional Unit 8: Financial Operations Management

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.1: Manage office budgets
Key Indicators:

8.1.1 Confer with managing partner(s) to identify strategic direction of the medical practice
8.1.2 Assess current market trends in the vicinity (e.g., social, economic, political)
8.1.3 Evaluate impact of incoming monies and how office resources are impacted by payments from insurance companies, government agencies, and private pay clients.
8.1.4 Develop individual budgets (e.g., revenue, expense, operating, line-item, department, cash-flow, capital)
8.1.5 Prepare annual budget to align with medical practice objectives

BIL: Essential

EDU:	12	AD
		P

Competency 8.2: Maintain accounting and financial control systems
Key Indicators:

8.2.1 Monitor total office financial system following basic accounting principles
8.2.2 Forecast financial expenditures, revenues, liability, and capital budgets needs
8.2.3 Develop/analyze accounting system needs for medical practice including documentation and control, process flow, general journal/ledger and subsidiary ledgers, revenue and expense determination, income distribution, and financial management for the medical practice
8.2.4 Manage financial information to interpret and communicate to various audiences for purposes of making decisions (e.g., physician/doctors, shareholders, staff)
8.2.5 Develop system for monitoring policies and procedures to direct financial activities of the medical practice (e.g., assets, liabilities, write-offs)
8.2.6 Design system of checks and balances and internal control of incoming resources and account balances to safeguard medical practice assets (e.g., account reconciliations, check signing, reimbursements, petty cash fund control, approvals, authorizations and verifications, security of medical practice assets)
8.2.7 Develop audit control system (e.g., schedule for audits, types of audits, financial statement audits)
8.2.8 Develop system for audit compliance

BIL: Essential

EDU:	12	AD
		P

Competency 8.3: Analyze financial statements
Key Indicators:

8.3.1 Determine procedures for financial and accounting activities (e.g., model, forecasting, benchmarking techniques, cost/benefit analysis)
8.3.2 Identify sources of revenue (e.g., medical reimbursement, clinical trials, ancillary services)
8.3.3 Prepare monthly accounting statements for review
8.3.4 Discuss impact government, insurance, and legal regulations have on finances (e.g., filing regulations between insurance and Medicare, Medicaid, HIPAA regulations, privacy and confidentiality issues, required pre-treatment permission, requirement for second opinion)
8.3.5 Conduct annual financial analysis in conjunction with accountant and managing office physician/doctor (e.g., compare actual to estimates, budget modifications)
8.3.6 Interpret financial statements
8.3.7 Prepare financial reports

BIL: Essential

EDU:	12	AD
		P

Competency 8.4: Develop system for materials procurement and payments
Key Indicators:

8.4.1 Identify principles and models for materials procurement (e.g., individual, group, and internet purchasing, discounts, leasing)
8.4.2 Develop systems for accounts payable and purchasing
8.4.3 Develop system to manage inventory (e.g., flow of goods, security, computerized in/out, historical data, equipment assets)

BIL: Essential

EDU:	12	AD
		P

Competency 8.5: Monitor coding for reimbursement procedures
Key Indicators:

8.5.1 Design a system to monitor accounts receivable (e.g., aging, benchmarking, net vs. gross income, outstanding accounts)
8.5.2 Follow current (updated frequently) coding systems and guidelines

8.5.3 Ensure compliance with regulatory agency and contract mandates (e.g., insurance, state, HEDIS [Health-Plan Employer Date Information Set], NCQA [National Committee for Quality Assurance], JCAHO [Joint Commission on Accreditation of Healthcare Organizations])
8.5.4 Manage billing and collection systems (e.g., patient billing records, billing procedures, month-end closing, electronic or manual claims processing, collection policies, collections correspondence, disputes, settlements, write-offs)

BIL: Essential

EDU:	12	AD
		P

Competency 8.6: Explore investment plans
Key Indicators:
8.6.1 Assess investment opportunities and markets available
8.6.2 Assess short- and long-term financial goals of medical practice partners
8.6.3 Discuss basic concepts of investments
8.6.4 Discuss criteria for selecting a financial advisor or broker

BIL: Essential

EDU:	12	AD
		P

Competency 8.7: Interact with bankers and financial consultants
Key Indicators:
8.7.1 Discuss importance of office manager's relationship with a banker
8.7.2 Compare services and charges of banking procedures (e.g., credit card services, automatic payment procedures, automatic transfer from client to office account, safe deposit boxes)

BIL: Essential

EDU:	12	AD
		P

Competency 8.8: Analyze fee schedules
Key Indicators:
8.8.1 Review current fee schedule models (e.g., case rates, contract reimbursement)
8.8.2 Establish fee schedule for physician/doctors' ensuring scope of charges are in compliance with managing physician/doctor's approval

8.8.3 Itemize factors affecting fee decisions (e.g., cost of equipment and supplies, time, technical assistance, outside consultants, office procedures)
8.8.4 Establish patient fee discount for advance pay client (e.g., prescribed orthodontic procedure paid in advance)
8.8.5 Conduct periodic review of fees with managing physician/doctor
8.8.6 Review policy for utilization of services under risk agreements

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.9: Negotiate third-party contracts
Key Indicators:
8.9.1 Utilize paper contracts (e.g., fee-for-service, risk-care programs, case rates, prospective payment)
8.9.2 Explore managing risks (e.g., stop-loss insurance, scope of services, health-care law)
8.9.3 Ensure quality healthcare (e.g., patient satisfaction, quality assurance, Joint Commission on Accreditation of Healthcare Organizations [JCAHO] and Centers for Medicare and Medicaid Services [CMS] requirements)

BIL: Essential

EDU:	12	AD
	I	P

Competency 8.10: Develop system for third-party payor reimbursement
Key Indicators:
8.10.1 Identify reason for non-payment
8.10.2 Track and collect withholds
8.10.3 Audit third-party reimbursements
8.10.4 Examine advantages and disadvantages of using an outside agency to collect for aging accounts

BIL: Essential

EDU:	12	AD
		P

Competency 8.11: Monitor compliance for tax laws, filing procedures, and deadlines
Key Indicators:
8.11.1 Research federal and state taxation laws and procedures
8.11.2 Interact with accountant to ensure tax compliance (e.g., pay schedules, tax reporting, quarterly reports, depreciation schedules)
8.11.3 Secure assistance of Certified Public Accountant (CPA) or payroll service

BIL: Essential

EDU:	12	AD
		P

Competency 8.12: Maintain quality and assurances in the office setting
Key Indicators:
8.12.1 Maintain documentation to support compliance with rules and regulations of insurance
8.12.2 Prepare for on-site inspection
8.12.3 Facilitate on-site visits
8.12.4 Respond to recommendations

Instructional Unit 9: Human Resource (HR) Management

BIL: Essential

EDU:	12	AD
		P

Competency 9.1: Design employee compensation and benefits program
Key Indicators:

9.1.1 Confer with managing physician/doctor to identify philosophy of pay and benefits for employees
9.1.2 Initiate an employee reward system to foster a positive work environment (e, g., recognition/reward program)
9.1.3 Review compensation models
9.1.4 Investigate various options for compensation (e.g., incentive pay, profit sharing, reward for suggestions, bonus)
9.1.5 Conduct market analysis (e.g., competition, economic conditions)
9.1.6 Develop compensation benchmarks
9.1.7 Determine compensation methods (e.g., performance measures, longevity, seniority scales, pay adjustments)
9.1.8 Develop policy for compensation communications (e.g., annual report, recordkeeping procedures for medical practice)
9.1.9 Evaluate job knowledge coordinated with compensation (e.g., difficulty, license or certification requirements, accountability)
9.1.10 Establish pay schedule for employees ensuring scope of charges are in compliance with managing physician/doctor's approval
9.1.11 Evaluate benefits of a fitness/wellness program for employees
9.1.12 Design employee benefits package (e.g., paid vacation, health insurance, vision insurance, dental insurance, life insurance, sick leave compensation, retirement benefits)
9.1.13 Design income distribution (e.g., medical practice partner, shareholder)
9.1.14 Investigate benefit program financing (e.g., cost-effectiveness, self-funding, self-insured)
9.1.15 Determine eligible employees (e.g., physician/doctor, manager, full-time vs. part-time, insurance options, child care options, in-house medical services)
9.1.16 Comply with all HR legal aspects (e.g., HIPAA, COBRA [Consolidated Omnibus Budget Reconciliation Act], IRS [Internal Revenue Service] Codes, Social Security, Workers Compensation)
9.1.17 Maintain awareness of market economics (e.g., sign-on bonus, supply/demand, downsizing)

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.2: Develop a system for job classifications within the organization
Key Indicators:

9.2.1 Interview employer to analyze specific office employment needs
9.2.2 Develop job descriptions aligning tasks with needs in respect to total organization (e.g., medical job categories, lab jobs, non-medical job categories)
9.2.3 Develop job descriptions delineating specific tasks for each employee (e.g., roles of office manager, accounting personnel, front office personnel, laboratory personnel, healthcare support services staff, professional staff)
9.2.4 Incorporate ethical human resource medical practices (e.g., ensure no pay inequities, training provided)

BIL: Essential

EDU:	12	AD
		P

Competency 9.3: Identify employee placement and workforce needs
Key Indicators:

9.3.1 Conduct analyses to identify needs for the medical office organization to operate in a cost-effective and efficient manner
9.3.2 Evaluate staffing requirements to meet the goals and objectives of the organization
9.3.3 Identify challenges of diverse staffing
9.3.4 Develop/implement process improvement program with adequate workers for flow of work
9.3.5 Estimate future hiring projections (e.g., retirements, expanding client level, new procedures)
9.3.6 Design recruitment/selection process for new employee(s)
9.3.7 Apply knowledge of employee development that helps the total medical office setting
9.3.8 Establish selection criteria for new hires (e.g., EEO [Equal Employment Opportunities] and ADA [Americans with Disabilities Act] factors, assessment, reference checks, criminal investigation, health information)
9.3.9 Interview employee candidates using employee skill-assessment tools and interviewing techniques
9.3.10 Process background check of prospective employee
9.3.11 Supervise employees
9.3.12 Delegate responsibilities
9.3.13 Develop work schedule to ensure that sufficient staff is available to meet needs of medical practice and office tasks, and that work hours/workload are equitable and fair for compensation

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.4: Develop procedures for employee evaluation and appraisal
Key Indicators:

9.4.1 Develop employee review method(s) (e.g., physician review, performance standards met, peer review, productivity/merit pay, critical incident event)
9.4.2 Design system for constructive feedback to improve performance
9.4.3 Develop plan for improved performance and/or promotion
9.4.4 Provide professional mentoring and guidance to employees
9.4.5 Develop strategies for retaining employees
9.4.6 Design a scale for merit pay

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.5: Design an employee training and continuing education program
Key Indicators:

9.5.1 Determine philosophy of medical practice for importance of training and education
9.5.2 Determine individual learning styles (e.g., coaching, formal, self-directed, group)
9.5.3 Prepare/manage resources for in-service training (e.g., time, finances)
9.5.4 Schedule employee in-service training
9.5.5 Respond to employees' request for continuing education and training on emerging technology
9.5.6 Research best medical practices regarding continuing education programs for employees in healthcare professions/offices (e.g., training models, seminars, text material, software programs)
9.5.7 Assess outcome of seminar or training and its value

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.6: Develop program for conflict resolution and office employee relations
Key Indicators:

9.6.1 Explore the laws and regulations for employee relations (e.g., local, state, federal, union policies, office employee manual)
9.6.2 Address/manage internal complaints and grievances

9.6.3 Explore strategies for dealing with cultural conflicts and differences
9.6.4 Employ established decision-making, problem solving, conflict resolution, and prioritizing techniques
9.6.5 Design a discipline procedure for specific infractions of office policy (e.g., reprimand, written warning, suspension, discharge, termination, documentation)
9.6.6 Comply with ADA (American with Disabilities Act) guidelines
9.6.7 Design employee assistance programs that are cost-effective and beneficial to both employee and employer (e.g., stress/anger management, counseling, substance abuse)
9.6.8 Release employee following established procedures for employee exit
9.6.9 Conduct exit employee interview (e.g., voluntary or involuntary exit)
9.6.10 Comply with FMLA (Family Medical Leave Act)

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.7: Maintain current conflict resolution and grievance procedures in office policy manual

Key Indicators:
9.7.1 Abide by labor laws
9.7.2 Investigate grievance models
9.7.3 Investigate complaints

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.8: Monitor compliance with state and federal employment laws

Key Indicators:
9.8.1 Interpret local, state, and federal laws and HR regulations into organizational policies and procedures
9.8.2 Research HR policies, laws, and regulations
9.8.3 Maintain current medical practices with changing HR policies and procedures
9.8.4 Monitor HR functions within entire medical practice (e.g., observe, document, investigate, discipline)

BIL: Essential

EDU:	12	AD
	I	P

Competency 9.9: Facilitate retirement planning

Key Indicators:

9.9.1 Identify various types of retirement plans available to medical practice personnel
9.9.2 Explore retirement plan laws and regulations
9.9.3 Investigate costs for investment management
9.9.4 Assist with financial planning for individual employees (e.g., seminars, open enrollment)
9.9.5 Monitor retirement investments (e.g., risks, benchmarking)

Instructional Unit 10: Marketing

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.1: Develop an overall business plan for the medical practice
Key Indicators:
10.1.1 Identify model business plans
10.1.2 Explore marketing impacts and their effect on plan
10.1.3 Budget for proposed plan

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.2: Develop strategic plan for marketing (e.g., one-, three-, and five-year)
Key Indicators:
10.2.1 Conduct periodic stakeholder needs assessment utilizing a strategic plan procedure (e.g., SWOT [strength, weakness, opportunities, and threats])
10.2.2 Collect data that identifies trends, strength, weakness, opportunities, and threats, and general community assessment information.
10.2.3 Develop an analysis using data collected from SWOT
10.2.4 Summarize analysis to identify major marketing goals
10.2.5 Identify organizational structure of medical practice to assist in achieving goals (e.g., history, specialty areas, size, corporate structure)

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.3: Design marketing plan
Key Indicators:
10.3.1 Examine local marketing data (e.g., census data, local economics, business coalitions, competition)
10.3.2 Utilize surveys to identify proposed marketing techniques
10.3.3 Target specific market areas
10.3.4 Examine supply and demand for local area
10.3.5 Conduct comparative fee analysis
10.3.6 Conduct geographic search for services provided within specific area

10.3.7 Create a marketing plan that continuously maintains and/or improves image of medical practice and markets individual medical practice
10.3.8 Calculate benchmarks to keep medical practice competitive
10.3.9 Develop promotional materials
10.3.10 Determine which advertising concepts are acceptable and within budget

BIL: Essential

EDU:	12	AD
	P	

Competency 10.4: Assess effectiveness of strategic, business, and marketing plans
Key Indicators:
10.4.1 Revisit strategic, business, and marketing plan to assess its validity
10.4.2 Modify strategic, business, and marketing plan if necessary

BIL: Essential

EDU:	12	AD
	I	P

Competency 10.5: Network to develop professional partnerships
Key Indicators:
10.5.1 Determine integration principles (e.g., merger or acquisition implications, consolidation proposals, contracting network)
10.5.2 Identify personnel implications (e.g., managing change reactions, resistance)
10.5.3 Explore risk analysis (e.g., cash flow projections, restrictions)
10.5.4 Explore change process (e.g., marketing, legal implications, financial needs, tax implications, employment agreements and compensation, bylaws, naming rights, legal counsel, bankers, financial advisers, consultants)
10.5.5 Investigate affiliations (e.g., Independent Medical Practice Association [IPA], Preferred Provider Organization [PPO], Management Service Organization [MSO], Physician Medical practice Management Company [PPMC], joint ventures)

BIL: Essential

EDU:	12	AD
	P	R

Competency 10.6: Initiate a public relations plan that includes community outreach programs

Key Indicators:

10.6.1 Assess need for patient education (e.g., handbook, brochures, educational materials)

10.6.2 Investigate community focus and collaboration efforts (e.g., targeted messages, sensitivity to cultural issues, community involvement, volunteer involvement, local health fairs, free clinics)

10.6.3 Analyze community health risks (e.g., collect clinical data, identify major issues)

10.6.4 Explore wellness and health benchmarks (e.g., good health concepts, behavior modification, disease management)

10.6.5 Initiate public relations methods (e.g., speakers' bureau, news articles, website presentations, service brochures)

10.6.6 Promote publicity with media (e.g., press releases, public service announcements)

10.6.7 Survey operational improvements or best medical practices (e.g., change management effectiveness, customer service medical practices, dealing with patients' concerns and complaints, satisfaction surveys)

Instructional Unit 11: Information Systems Management

BIL: Essential

EDU:	12	AD
		P

Competency 11.1: Conduct analysis of information systems needed for the medical practice

Key Indicators:

11.1.1 Identify vendors via trade shows or professional journals
11.1.2 Assess advantages and limitations of database systems available for use in medical office
11.1.3 Investigate costs, service available, references, and other criteria for total system
11.1.4 Determine which information systems best suits needs of medical practice

BIL: Essential

EDU:	12	AD
		P

Competency 11.2: Conduct information system training

Key Indicators:

11.2.1 Conduct needs assessment
11.2.2 Plan for system needs (e.g., budget, equipment needed, instruction)
11.2.3 Plan for implementation of information system integration in to medical practice
11.2.4 Conduct training

BIL: Essential

EDU:	12	AD
		P

Competency 11.3: Manage database for information system

Key Indicators:

11.3.1 Identify needs for database (e.g., purchase or lease)
11.3.2 Secure database program software
11.3.3 Oversee database management and information systems

BIL: Essential

EDU:	12	AD
		P

Competency 11.4: Manage network security for information system
Key Indicators:
11.4.1 Ensure compliance with Health Insurance Portability and Accountability Act (HIPAA)
11.4.2 Monitor accountability within the medical practice
11.4.3 Ensure that all confidentiality policies for the medical practice are enforced (e.g., disclosure, releases)
11.4.4 Maintain information system integrity

BIL: Essential

EDU:	12	AD
		P

Competency 11.5: Access electronic information resources
Key Indicators:
11.5.1 Ensure medical practice has appropriate equipment for information system (e.g., computers, video, audio, CD-ROMs, interactive systems)
11.5.2 Oversee individual office information systems within the total office (e.g., database systems, front office, accounting office]
11.5.3 Manage the information network system for total office

Instructional Unit 12: Risk Management

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.1: Maintain safety in the medical setting
Key Indicators
12.1.1 Identify preplanned action in an emergency (e.g., fire, inclement weather, lock-down, bomb threat)
12.1.2 Initiate triage procedures in event of medical emergency
12.1.3 Explain legal implications in event of emergency

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.2: Complete first aid and cardiopulmonary resuscitation (CPR) training
Key Indicators:
12.2.1 Acquire first-aid certification through the *American Red Cross*
12.2.2 Acquire cardiopulmonary resuscitation (CPR) certification through the *American Red Cross or American Heart Association*
12.2.3 Maintain basic first-aid and CPR certification

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.3: Respond to medical office emergencies
Key Indicators:
12.3.1 Recognize medical emergency situations
12.3.2 Seek the assistance of personnel appropriate to given situation
12.3.3 Locate emergency equipment (e.g., crash cart/kit, eyewash station)
12.3.4 Follow office protocol for emergencies

BIL: Essential

EDU:	12	AD
	P	R

Competency 12.4: Protect workers from ergonomic injuries in office setting
Key Indicators:
12.4.1 Ensure healthy ergonomic medical practices
12.4.2 Avoid repetitive motion activities that might cause injury
12.4.3 Maintain posture to prevent injuries in medical office (e.g., sitting, chairside assisting, at computer)
12.4.4 Lift/transport objects and materials in accordance with established safe medical practices

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.5: Maintain legal compliance for risk management within the medical practice
Key Indicators:
12.5.1 Research local, state, and federal laws and regulations (e.g., OSHA [Occupational Safety and Health Administration], ADA [Americans with Disabilities Act], FMLA [Family Medical Leave Act], ERISA [Employee Retirement Income Security Act 1974])
12.5.2 Maintain relationship with legal counsel in event of need
12.5.3 Explore extent of legal liability for medical practice and employees (e.g., fraud and abuse, contracts)
12.5.4 Explore options of risk-management strategies (e.g., peer review, evaluation of care, staff participation, notification, documentation of activities)
12.5.5 Monitor medical practice compliance (e.g., continuing education requirements, prevention of fraudulent medical practices, record falsification or alternation, inadequate training, patient abuse, lack of follow-up)
12.5.6 Develop a plan for communication to audiences for damage control (e.g., public relations, staff, patients)

BIL: Essential

EDU:	12	AD
	P	

Competency 12.6: Utilize record-keeping procedures that include procedure for archiving medical practice history data

Key Indicators:

12.6.1 Describe a system for medical practice recordkeeping
12.6.2 Use computer system for records
12.6.3 Organize the record systems to maximize its efficiency (e.g., flow, discriminate what to keep and what to discard, longevity of records, archiving records, storage and distribution)

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.7: Maintain liability insurances (e.g., property, personal, malpractice, embezzlement)

Key Indicators:

12.7.1 Explore options available for insurance (e.g., compare coverage, costs, contract terms, underwriting)
12.7.2 Investigate risks/benefits of insurance plans
12.7.3 Determine medical practice commitment to maintaining insurance
12.7.4 Purchase/adjust insurance

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.8: Establish personnel and property security plans and policies

Key Indicators:

12.8.1 Explore local, state and federal laws and regulations with regard to harassment in workplace, confidentiality, FLSA [Fair Labor Standards Act], and OSHA
12.8.2 Utilize HR investigation guidelines and models (e.g., interview, recording, interpretation of findings, documentation)
12.8.3 Implement monitoring procedures that are legal, appropriate, and protect confidence
12.8.4 Assess potential for workplace security risks (e.g., internal theft, technology sabotage, vandalism)
12.8.5 Develop/document property security procedures (e.g., physical facility, equipment)

12.8.6 Communicate security plan and procedures internally
12.8.7 Conduct scheduled security checks documenting date, time, and findings
12.8.8 Adhere to patient privacy protection guidelines

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.9: Develop quality assurance and patient satisfaction program via follow-up survey process

Key Indicators:
12.9.1 Adhere to guidelines of capitation contracting (e.g., patient cost, rates, fees, credentialing)
12.9.2 Monitor quality management (e.g., standards, feedback, quality improvement, training)
12.9.3 Document patient satisfaction for improvement (e.g., follow-up survey)
12.9.4 Manage malpractice risks (e.g., incompetent or impaired physicians, unnecessary procedures, misconduct with patient, medical errors, lack of training, poor documentation)
12.9.5 Monitor medical delivery system (e.g., patient flow, scheduling, standards, performance improvement)

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.10: Develop/document information security procedures (e.g., patient, personnel, business information)

Key Indicators:
12.10.1 Adhere to HIPAA (Health Insurance Portability and Accountability Act) guidelines
12.10.2 Develop/document information security procedures (e.g., patient, personnel, and business information)
12.10.3 Document security procedures and incidents of breached security
12.10.4 Develop flow of information for the office (e.g., scheduling, ancillary staff, physicians, medical records, billing staff, reports and analyses)
12.10.5 Adhere to office policies and procedures to prevent error that would increase security risks to medical practice
12.10.6 Document/follow-up on incident reports
12.10.7 Modify procedures to address breaches in security and safety

BIL: Essential

EDU:	12	AD
	I	P

Competency 12.11: Audit at-risk financial activities on regular schedule
Key Indicators:
12.11.1 Adhere to local, state, and federal tax laws
12.11.2 Adhere to generally accepted accounting principles (Generally Accepted Accounting Principles [GAAP]) to maintain accurate records for medical practice
12.11.3 Utilize systems analyses models to assist with financial forecasting
12.11.4 Utilize accepted auditing medical practices
12.11.5 Utilize services of accounting experts to ensure tax reports and returns are current

BIL: Essential

EDU:	12	AD
		P

Competency 12.12: Network with professional resources for at-risk related issues
Key Indicators:
12.12.1 Utilize services of outside consultant when necessary for expertise outside realm of medical practice (e.g., chart auditing, billing compliance)
12.12.2 Utilize specialist when needed for negotiating contract outside medical office (e.g., real estate transaction, equipment leases)

BIL: Essential

EDU:	12	AD
		P

Competency 12.13: Monitor compliance with contractual mandates
Key Indicators:
12.13.1 Maintain records of contracts with outside vendors
12.13.2 Consult legal counsel when necessary to interpret contract
12.13.3 Research laws to ensure compliance with outside agencies (e.g., Medicare, Medicaid)

Instructional Unit 13: Organizational Management

BIL: Essential

EDU:	12	AD
		P

Competency 13.1: Develop/maintain medical office policy manual
Key Indicators:
13.1.1 Develop/update policy and operations manual for medical practice
13.1.2 Review/revise department policies with each department supervisor/manager

BIL: Essential

EDU:	12	AD
		P

Competency 13.2: Provide leadership for organizational change of the medical practice
Key Indicators:
13.2.1 Identify the dynamics of the medical practice (e.g., politics, power, interactions, decision-making, focus)
13.2.2 Lead/manage an organizational change process for medical practice improvement
13.2.3 Identify change-agents of the medical practice (e.g., environmental changes, planning, theories, motivators, resistance to change, continuous learning)
13.2.4 Develop/follow performance goals (e.g., objectives, outcomes, expectations, mentoring, prioritization, implementation)
13.2.5 Conduct staff meetings (e.g., agenda, logistics, objectives, participants, facilitator, recorder, summary, follow-up)
13.2.6 Facilitate/foster teamwork among office personnel, clinical staff, and physician/doctor(s)
13.2.7 Manage organization's expectations

BIL: Essential

EDU:	12	AD
		P

Competency 13.3: Develop/maintain governing system
Key Indicators:
13.3.1 Conduct strategic planning session - SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis for use in long-term planning with regard to office space, equipment needs, emerging technology, compliance with government regulations, and resources available
13.3.2 Compile report following SWOT analysis

13.3.3 Develop pathways for organizational communications
13.3.4 Facilitate teaming principles within the organization (e.g., trust relationships, dialogues within departments, value each department, complementary management, recognize roles)
13.3.5 Facilitate organization's governing structure (e.g., communicate, decision-making process, define leadership roles, committee roles, and accountability of all role, legal ramifications of compliance/non-compliance)

BIL: Essential

EDU:	12	AD
		P

Competency 13.4: Assess governing system
Key Indicators:
13.4.1 Adhere to organizational procedure rules for medical practice (e.g., partner identification/description, managing partner, legal counsel, stock issued/ownership, stockholder and employment agreements, disclosure, insurance, malmedical practice, liability)
13.4.2 Document organizational history (e.g., key documents, photographs, records retention, systems maintained)
13.4.3 Conduct survey to measure results
13.4.4 Assess group dynamics (e.g., personality surveys, learning styles, attitude)

BIL: Essential

EDU:	12	AD
		P

Competency 13.5: Conduct stakeholder assessment
Key Indicators:
13.5.1 Assess organizational constituents and needs
13.5.2 Conduct needs assessment (e.g., community)
13.5.3 Facilitate program development (e.g., focus groups)

BIL: Essential

EDU:	12	AD
	I	P

Competency 13.6: Manage staff teaming
Key Indicators:
13.6.1 Manage staff development techniques (e.g., targeted learning, learning styles, training models, Internet technology, motivational theories)
13.6.2 Assess human dynamics (e.g., emotional health, personality evaluation, group dynamics, burnout)
13.6.3 Assess organization's mindsets (e.g., physicians/doctors, manager)

BIL: Essential

EDU:	12	AD
	I	P

Competency 13.7: Facilitate physician/doctor's understanding of good business medical practices
Key Indicators:
13.7.1 Identify issues for providing quality care to patients (e.g., patient satisfaction, cost effectiveness, referrals)
13.7.2 Discuss organizational goals (e.g., conflict with personal goals, alignment with organization's vision/values)
13.7.3 Discuss physician's expectations (e.g., labor needs/shortages, sensitivity to staff needs, delegation to other providers)
13.7.4 Ensure patient safety (e.g., minimize errors, legibility of handwriting, miscommunications)

BIL: Essential

EDU:	12	AD
	I	P

Competency 13.8: Implement quality assurance program
Key Indicators:
13.8.1 Maintain effective teams (e.g., empower, trust, train, reward)
13.8.2 Identify quality benchmarks (e.g., accurate, timely, accreditation process, self-assessments, feedback to teams)

13.8.3 Explore financial models (e.g., cost-effective performance expectations, forecasting models, budgeting, cash flow)

13.8.4 Summarize effectiveness for meeting patients' needs (e.g., medical assessment, diagnosis development referrals, documentation, patient expectations, quality care)

Instructional Unit 14: Clinical Operations

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.1: Facilitate business operations
Key Indicators:

1.1.1 Utilize the organizational strategic plan to assess business operations needs
1.1.2 Conduct operational planning assessment if necessary
1.1.3 Identify strategies to implement action plans for management initiatives
1.1.4 Identify strategies consistent with organizational culture (e.g., awareness of personal dynamics, preferences, cultural barriers, physician/doctor buy-in, medical practice of medicine vs. business of healthcare)

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.2: Analyze staffing needs and scheduling
Key Indicators:

14.2.1 Identify staffing and scheduling needs (e.g., software applications, analysis of financial data, revenues/expenses of staffing and scheduling)
14.2.2 Identify management personnel factors (e.g., wages, job classifications, industry norms)
14.2.3 Identify staffing personnel factors (e.g., labor market analysis, job analysis, team needs, staff space needs, hours/shifts)
14.2.4 Discuss patient/staff/physician/doctor satisfaction (e.g., expectations, indicators)
14.2.5 Explore concerns for patient and staff safety issues (e.g., training, education, environmental hazards, safety issues, infection control, protective measures, workers compensation)
14.2.6 Analyze scheduling issues (e.g., patient flow, appointment protocols, emergency calls, surgery scheduling, impact on facility utilization)

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.3: Analyze need for ancillary clinical support services (e.g., lab, x-ray, rehabilitation)

Key Indicators:

14.3.1 Identify need for ancillary services
14.3.2 Identify various certifications or licenses required
14.3.3 Maintain quality clinical standards
14.3.4 Implement ancillary clinical support services (e.g., interface applications, communications, reports for charts, HIPAA, security of data; confidentiality concerns)
14.3.5 Evaluate delivery of ancillary support services

BIL: Essential

EDU:	12	AD
		P

Competency 14.4: Establish purchasing system and inventory control

Key Indicators:

14.4.1 Design policies for purchasing supplies and materials (e.g., bid process, discounts, vendor selection, government regulations, ethics)
14.4.2 Develop procedures and forms for processing purchase orders (e.g., e-commerce options, delivery procedures)
14.4.3 Implement inventory control system (e.g., check-in/check-out, tracking, shelf-life control, flow of inventory, security)
14.4.4 Document inventory costing
14.4.5 Identify office technology needs (e.g., financial or word-processing software, office furnishings and equipment, medical equipment)
14.4.6 Assess cost benefit of implementing new technology in office procedures (e.g., new software program, new monitoring system, new processes, new databases)
14.4.7 Discuss purchases with employer for final decision
14.4.8 Develop procedure for purchasing large equipment items (e.g., bidding, comparative pricing, discounts)
14.4.9 Design system for quality control of dated items (e.g., blood supplies, pharmaceuticals)
14.4.10 Design control system for pharmaceutical items (e.g., regulations, prescription management, narcotic controls, storage and security)
14.4.11 Evaluate equipment performance
14.4.12 Facilitate office lease
14.4.13 Assist in designing office space to maximize its use
14.4.14 Identify use of technology in financial operations in a medical office

14.4.15 Maintain depreciation and warranty schedule for large equipment items
14.4.16 Network with peer office colleagues to investigate success of their programming/systems

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.5: Establish patient flow schedule
Key Indicators:
14.5.1 Design procedure for client flow to provide efficient, profitable patient services (e.g., patient and nonpatient flow protocol)
14.5.2 Manage patient needs for clinical requirements (e.g., medical assessment, emergencies, treatment plans, patient education, referrals, patient discharge, documentation)
14.5.3 Manage patient recall system
14.5.4 Manage patient communication system (e.g., confidentiality, HIPAA guidelines)
14.5.5 Monitor facility design to maximize efficiency and use of space
14.5.6 Manage facility space is in compliance with local, state and federal guidelines, building codes, security concerns, safety compliance, mechanical systems efficiency, fire safety issues)

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.6: Implement patient communication system
Key Indicators:
14.6.1 Manage total communication process (e.g., confidentiality issues, e-mail, phone system, pagers, intranet/network systems)
14.6.2 Monitor call center activities (e.g., confidentiality, triage system, service orientation, emergencies)
14.6.3 Design guidelines and procedures for Internet-based technology use (e.g., web page, electronic information processing, health-care research, resources/references)
14.6.4 Design patient education system (e.g., references, paper and electronic information)
14.6.5 Access technology for knowledge (e.g., video conferencing)
14.6.6 Plan for staff in-service training for new technology and systems

BIL: Essential

EDU:	12	AD
		P

Competency 14.7: Design clinical pathway system

Key Indicators:

14.7.1 Design clinical pathways (e.g., team involvement, lead physician/doctor, impact on care, non-clinical staff involvement)

14.7.2 Provide for ongoing quality assurance (e.g., patient advocacy, satisfaction evaluation data)

BIL: Essential

EDU:	12	AD
	I	P

Competency 14.8: Facilitate system for monitoring credentials, licenses, and certifications

Key Indicators:

14.8.1 Monitor licensing, certification processes and credentialing requirements including renewals and updates requiring continuing education

14.8.2 Maintain current data regarding local, state and federal requirements for credentials

14.8.3 Develop database for credentialing contacts and information

14.8.4 Acquire/maintain provider numbers

BIL: Essential

EDU:	12	AD
		P

Competency 14.9: Design process for improving overall clinic operations

Key Indicators:

14.9.1 Review audits, documentation, coding, and other office procedures to assess need for change/improvement

14.9.2 Compare current and historical data to determine improvement methods

Appendix A

Review Panels

Ohio Business TCP
Futuring Panel Participants

Nichole Nares, Human Resource Consultant, Nationwide Mutual Insurance Company, Columbus

Roger Campbell, Training Manager, Worthington Industries, Columbus

Jane Cape, Dean, Business Technologies, Clark State Community College, Springfield

Julie Danner, Manager, Training and Development, Ross Products Division, Columbus

Chris Hamm, Financial Consultant, First Merit Securities, Medina

Christina Hutchings, Manager, Financial Reporting, Lane Bryant, Reynoldsburg

Jeff Hutchins, Founder, VITAC (retired), Canonsburg, PA

John Martin, President, Optimum System Products, Inc., Columbus

James Nemcek, CEO, Alearna, Columbus

Karen Nemcek, E-Learning Consultant, Alearna, Columbus

Linda Shimp, Human Resources Manager, YSK Corporation, Chillicothe

Roy Smoot, President & CEO, Columbus Speech and Hearing, Columbus

Cheryl Sparks, Human Resources Director; Vorys, Sater, Seymour and Pease LLP; Columbus

Julie Talks, Accounting/Office Manager, Optimum Systems, Columbus

Robert Thomas, Case Manager, Supervisor, Franklin County Board of MR/DD—Case Management, Columbus

Judith Wright, Corporate Secretary, Karlsberger Companies, Columbus

Kym Yahn, Workforce Development Manager, Dayton Area Chamber of Commerce, Dayton

Joseph Zielinski, Certified Business Consultant, EISC, Inc., Toledo

Ohio Business Core TCP
Focus Panel Participants

Dotti Falkenstein, Coordinator, Cooperative Business Education, Centerville High School, Centerville

Dennis Folkerth, Business and Marketing Instructor, Upper Valley Joint Vocational School, Piqua

Virginia Groff, Business Information Technology Instructor, Mansfield Senior High School, Mansfield

Sue Lake, Business Instructor, Muskingum-Perry Career Center, Zanesville

Stephanie Mendelson, Business Administration and Management Instructor, Swiss Hills Career Center, Woodsfield

Sue Rossi, Dean; Business, Computer, & Office Information Technology; Jefferson Community College; Steubenville

Larry Zachrich, Dean of Business, Northwest State Community College, Archbold

Ohio Medical Office Management TCP Business and Professional Panel Participants

Mary C. Barr, Operations Manager, River View Surgery Center, Lancaster

Anna Lee Duffie, CMA, CMM, President, Reimbursement for Medical Services, Inc., Germantown

Carol Hutchins, Administrative Assistant, Genesis HealthCare System, Zanesville

Lora Meikle, Office Manager, Cherry Westgate Family Practice, Inc., Newark

Tim Murnane, President, Cor-Ben Consultants, Inc., Columbus

Valeri L. Rush, Manager of Central Business Office; North Central Ohio Family Care Center, Inc.; Ontario

Ohio Medical Office Management TCP Educators Panel Participants

Janice Anderson, Business Instructor, Wayne County Schools Career Center, Smithville

Beverly Bronkar, Administrative Assistant Instructor, Adult Business Office Education, Eastland Career Center, Groveport

Evelyn Finley, Office Technology Instructor, Polaris Career Center, Middleburg Heights

Karen Flyte, Computer Technology Training Coordinator, Polaris Career Center, Middleburg Heights

Gail McGreevy, Instructor, Muskingum-Perry Career Center, Zanesville

Ohio Medical Office Management TCP Stakeholders Panel Participants

Tina Barr, Operations Manager, River View Surgery Center, Lancaster

Gail McGreevy, Instructor, Muskingum-Perry Career Center, Zanesville

Valeri Rush, Manager of Central Business Office, North Central Ohio Family Care Center, Inc., Ontario

Appendix B

College Tech Prep Pathway Template

(High School)

(Career Center)

(Community College)

College Tech Prep Program

(School Year)

9th GRADE	CREDIT	10th GRADE	CREDIT	11th GRADE	CREDIT	12th GRADE	CREDIT

Recommended Prerequisites for Grade 11 of Tech Prep	Recommended for College Portion of Tech Prep

Junior Year Tech Center/College Technical Courses		Senior Year Tech Center/College Technical Courses	
*Technical Subjects	On-transcript _____ College Credits	*Technical Subjects	_____ College Credits

Articulated Credits: -_____ Community College

This template is used to facilitate Ohio College Tech Prep Pathways and is submitted by the Ohio College Tech Prep Consortium with the application.
Revised 6/20/03

DEGREE: ASSOCIATE OF _____

_____ - College Tech Prep _____
(Career Center) (Name of College Tech Prep Program)

Term Taken	First Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component
Term Taken	**Second Term**	**Pre-requisite**	**Co-requisite**			
Term Taken	**Third Term**	**Pre-requisite**	**Co-requisite**			

BEST COPY AVAILABLE

DEGREE: ASSOCIATE OF _____

_____ - College Tech Prep _____

(Career Center) (Name of College Tech Prep Program)

Term Taken	Fourth Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component

Term Taken	Fifth Term	Pre-requisite	Co-requisite			

Term Taken	Sixth Term	Pre-requisite	Co-requisite	Quarter Credit Hours	University Pathway Equivalent	Completed as Tech Prep Component

Revised 6/20/03

_____ Total Quarter Credit Hours

BEST COPY AVAILABLE

Appendix C

Professional Associations and Certifications

Medical Office Management

Professional Associations and Certifications

Associations

- American Association of Medical Transcription (AAMT)
- American College of Medical practice Executives (ACMPE)
- American Health Information Management Association (AHIMA)
- Certified Medical Assistant (CMI)
- Medical Group Management Association (MGMA)
- Medical practice Management Institute (PMI) (PMI-MD)
- Ohio State Medical Association (OSMA)
- Professional Association of Health Care Office Management (PAHCOM)

Certifications

- Central Benefits Professional (CBP) via World at Work Association Certified Compensation Professional (CCP) via World at Work Association
- Certified Employee Benefits Specialist (CEBS) via International Foundation of Employee Benefit Plans [www.ifebp.org]
- Certified Safety Professional (CSP) via Board of Certified Safety Professionals
- Occupational Health and Safety Technologist (OHST) via American Board of Industrial Hygiene and Board of Certified Safety Professionals
- Certified Health Unit Coordinator
- Registered Records Administrator
- Certified Coding Specialist CCS
- Certified Medical Billing Specialist
- Certified Medical Transcriptionist
- Certified Medical Coder

Appendix D

Ohio Tech Prep Consortia

Ohio Tech Prep Consortia

Website: www.regents.state.oh.us/techprep

PHASE I (formed 1992)
1. Heart of Ohio
2. Miami Valley
3. North Central
4. North Coast
5. Partners of Marion
6. Washington-Morgan-Meigs

PHASE II (formed 1993)
7. Akron Area
8. Columbiana County
9. Kent
10. Lakeland
11. Ohio South
12. Stark County
13. Upper Miami Valley

PHASE III (formed 1994)
14. Clark State
15. Greater Cincinnati
16. Eastern Ohio Valley
17. Lorain County
18. Mid-East Ohio
19. West Central
20. Workforce Development Council

PHASE IV (formed 1995)
21. Ohio State - Agricultural Technical Institute (with programs at locations throughout Ohio)
22. Mahoning Area
23. Northwest Ohio
24. Tuscarawas Valley

PHASE V (formed 1996)
25. East Central Ohio
26. Ohio Valley
27. Maumee Valley
28. Southeast

Note: Consortia 8, 9 and 24 merged with headquarters at 09

BEST COPY AVAILABLE

10/99
dll

U.S. Department of Education
Office of Educational Research and Improvement (OERI)
National Library of Education (NLE)
Educational Resources Information Center (ERIC)

NOTICE

Reproduction Basis

[X] This document is covered by a signed "Reproduction Release (Blanket)" form (on file within the ERIC system), encompassing all or classes of documents from its source organization and, therefore, does not require a "Specific Document" Release form.

[ ] This document is Federally-funded, or carries its own permission to reproduce, or is otherwise in the public domain and, therefore, may be reproduced by ERIC without a signed Reproduction Release form (either "Specific Document" or "Blanket").